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of Transportation

**Federal Highway
Administration**

Final Case Study for the National Scenic Byways Study

New Hampshire's Scenic Byways:
Economic Impacts

Scenic **BYWAYS**



September 1990

NOTICE

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Final Case Study
for the
National Scenic Byways Study

**NEW HAMPSHIRE'S SCENIC BYWAYS:
ECONOMIC IMPACTS**

SEPTEMBER 1990

Prepared for
The Federal Highway Administration

Submitted by
New Hampshire Department of Transportation

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EXECUTIVE SUMMARY

This study was initiated in the spring of 1990 when the New Hampshire Department of Transportation (NHDOT) applied for and received a grant from the Federal Highway Administration (FHWA) to pursue an economic case study of the potential for a scenic byways system in New Hampshire.

The project was carried out by a scenic byway project team including a representative from the Governor's Office; the Office of State Planning which was assigned primary administrative responsibility for the project; the Department of Resources and Economic Development, Office of Vacation Travel (DRED/OVT) which focused on the implication of such a program on the Tourism/Leisure travel industry; the NHDOT which was concerned with the highway implementation of the overall program; and the FHWA which had a significant interest in the project as part of the larger national program.

The case study as designed includes a comparative analysis of two areas within the State. The first is the Kancamagus Highway area which traverses the scenic White Mountains from Conway to Lincoln. In 1989, the Kancamagus Highway was dedicated as a National Scenic Byway by the US Forest Service. The Lake Sunapee area including portions of the Towns of Newbury, New London and Sunapee was the focus of the second portion of the study. This area included a number of scenic, cultural and historic resources all of which would be potential ingredients for a scenic byway system.

The process initially involved a review of demographic data for each area by Sarah A. Hughes, AICP, who was hired to manage the overall project.

A survey document was developed for this project by Jerry A. Vaske, Ph.D. who also analyzed the data for inclusion in the final report. The surveys were distributed to key locations within each area. Travelers were asked why they come to each area and additional questions related to interest in scenic byways, routes and travel plans. A total of 713 surveys were completed in the Kancamagus area and over 240 were analyzed from the Sunapee area.

The preliminary results of the case study were presented to and discussed with a scenic byways task force during an intensive one-day meeting. The task force represented the recreational regions in the State, and included the project team members and individuals from a variety of the state's business, cultural and historic organizations. The response from this group was positive and supported the initial conclusions. The task force felt strongly that local communities would express significant support for promoting scenic byways. The members recognized the program as a method of spreading tourism dollars around the state on a geographic as well as a calendar year basis. The opportunities for public/private partnerships were clear. The question of maintenance of scenic areas and their protection was raised as a long term concern. A statewide sign program, informational and directional, was considered critical to the purpose of encouraging tourism and travel along scenic byways.

The report confirms that 98% of the respondents in the Kancamagus area consider scenic routes in their travel plans and that nearly one third state that they "always" use scenic back roads. This finding is strongly supported in the Lake Sunapee area. In the latter, completed surveys

indicated that 94% of the respondents consider scenic routes when they travel and that 97% indicated that they travel on scenic back roads.

It is clear in both areas that the principal method of introduction to these areas is through friends and word of mouth. Only a small percentage were made aware of the area through any formal promotional process. It would appear that identifying scenic byways and providing mapped information would provide the type of information that a vast majority of potential travelers could and would use in planning trips. When considering travel, the respondents were clear that mountains and water were key considerations. While the Kancamagus area focused on mountains and rivers the Sunapee area travelers were more interested in lakes, obviously reflecting the importance of Lake Sunapee. Expenditure patterns were similar in both areas although the per capita outlays in the Lake Sunapee area were roughly 10% higher than in the Kancamagus Highway area.

The report confirms that the State of New Hampshire has no special promotional focus directed towards the scenic byways of the State. However, several national and statewide studies are referenced which clearly indicate that the potential economic benefit of a formal scenic byway would be a significant addition to the tourism program in the areas studied.

A Lake Sunapee area scenic byways system is recommended which comprises a logical and basic loop route around Lake Sunapee via NH Routes 11/103B/103/103A. It is emphasized however, that the lack of good lake visibility on this loop warrants the development of a system of "spur" routes to specific overlook, scenic and or cultural locations. Such an

approach would integrate the proposed byway system into the existing fabric of the regions economy.

Finally, the report concludes that the State of New Hampshire should proceed with the development of one or more scenic byways. The study revealed a very strong interest in scenic routes on the part of tourists and other visitors to the state. The development of a scenic byways program would recognize this interest and would address a clearly defined need.

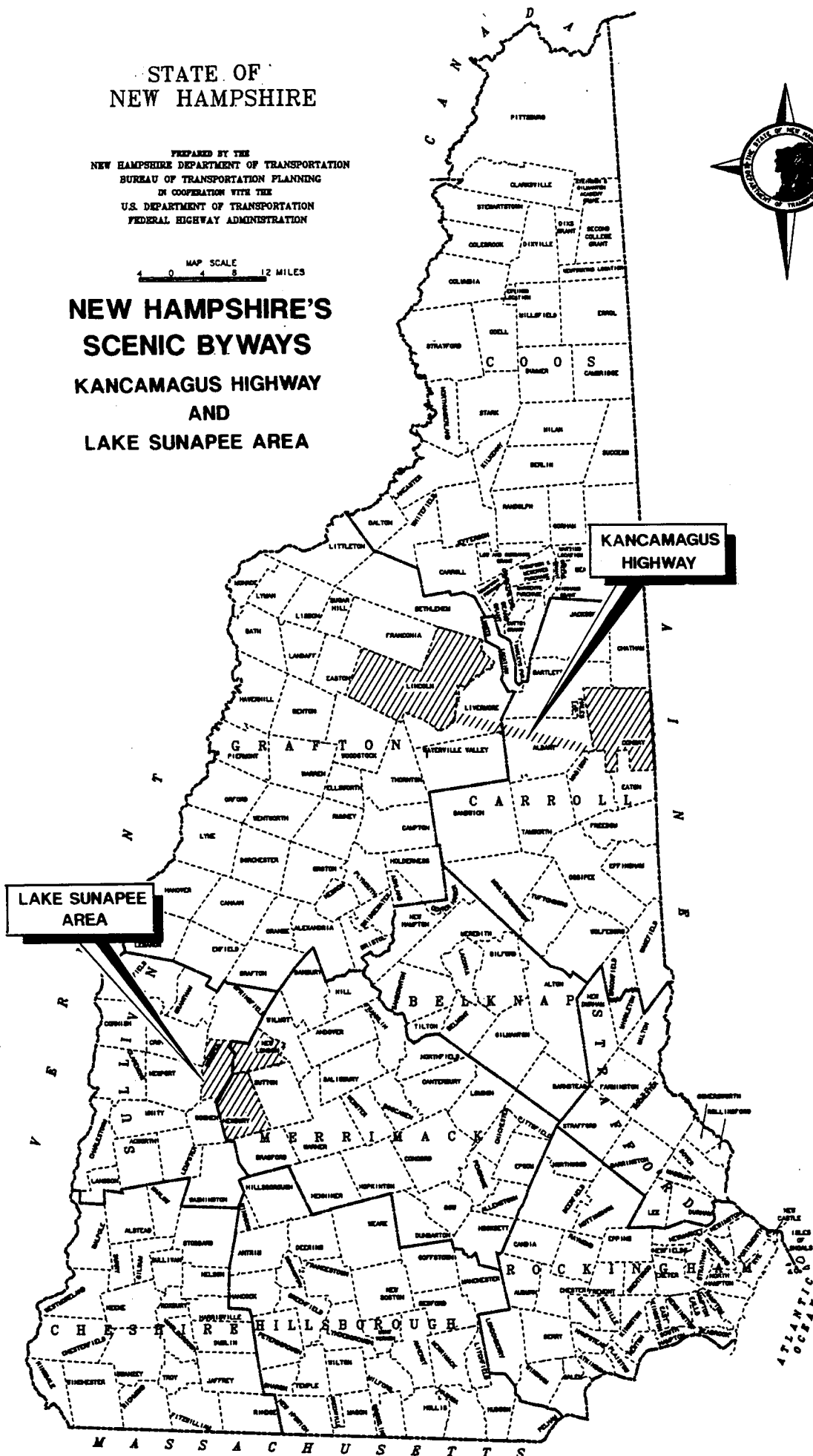
STATE OF
NEW HAMPSHIRE

PREPARED BY THE
NEW HAMPSHIRE DEPARTMENT OF TRANSPORTATION
BUREAU OF TRANSPORTATION PLANNING
IN COOPERATION WITH THE
U.S. DEPARTMENT OF TRANSPORTATION
FEDERAL HIGHWAY ADMINISTRATION

MAP SCALE
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NEW HAMPSHIRE'S
SCENIC BYWAYS

KANCAMAGUS HIGHWAY
AND
LAKE SUNAPEE AREA



PART I

PHASE ONE REPORT

I. INTRODUCTION

The State of New Hampshire Scenic Byways initiative grew out of the requirements that the United States Department of Transportation prepare a report on National Scenic Byways and out of the interest of the State of New Hampshire in identifying Scenic Byway locations within its own highway system.

In the Spring of 1990, the New Hampshire Department of Transportation applied for and received a grant from the Federal Highway Administration to pursue an economic case study of the potential for a Scenic Byways system in New Hampshire. An ad hoc committee was formed of representatives of the New Hampshire Department of Transportation, Office of State Planning, the Department of Resources and Economic Development and its Office of Vacation Travel, the Federal Highway Administration and the private sector. This committee has indicated its support for the creation of a nationwide Scenic Byways plan and would like to see that plan include segments of New Hampshire's plan. The State of New Hampshire does not have its own Scenic Byways system at this time, though the National Forest Service has designated the Kancamagus Highway as one of the Scenic Byways in the Forest Service's Scenic Byways system. The State of New Hampshire does have a scenic roads and easements program which was developed under the National Highway Beautification Act of 1965 and the New Hampshire R.S.A. 231:157 Scenic Roads (1971).

In 1987, the President's Commission on the American Outdoors recognized the importance of "pleasure driving" in American society.

Americans are at home on the road. Pleasure driving to view the historical, natural, and pastoral qualities offered by many of our nation's secondary roads is an important part of recreation for a majority of our population, comprising some 15 percent of all vehicle miles driven.

The President's Commission recommended that local and state governments create a system of Scenic Byways, composed of scenic roadways and thoroughfares throughout the nation, and take action to protect these resources. It recommended further that Congress establish an incentive program of matching grants to local and state governments to encourage Scenic Byway designations, and that information concerning Scenic Byways be made available through partnerships between the private sector and all levels of government (Report of the President's Commission, "Americans Outdoors, The Legacy, The Challenge", 1987).

What is a "Scenic Byway"? A scenic byway can be defined as a road in an area of outstanding aesthetic, natural, cultural, or historic significance. Scenic byways can be roads passing through communities that railroads and highways passed by, or "that time forgot", providing the traveller an opportunity to get off the beaten track and explore the "real America". A scenic byway may provide its users with a dramatic recreational experience and an active interpretation program. The Federal Highway Administration, in its 1988 report on Scenic Byways, described Scenic Byways as follows:

A scenic road or byway is more than just a road with some trees and shrubs along its borders. It is a road having roadsides or corridors of high natural beauty and cultural or historic value. It gives the traveller glimpses of history, nature, geology, landscaping and cultural activities along the road.

Scenic byways may include interstate highways, parkways and historic routes, rustic roads and seldom used backways. Even hiking or biking trails and boating routes could be considered scenic byways. Generally, the Federal Government's interpretation of scenic byways has been limited to routes used by automobiles. For the purposes of this case study, the term "Scenic Byways" will be limited to public roads open to automobile travel. Exceptions

to this definition may include private roads of particular significance and will be noted as exceptions to the operating definition.

Scenic byways can be used to promote the cultural importance and natural beauty of an area. They provide an opportunity to satisfy the needs of both environmental protection and preservation, and economic growth and development. They raise the consciousness of the public to the need for conserving natural, cultural and historic resources. They also encourage tourists and other travellers to stay in an area longer, bringing economic benefits to communities and states.

Scenic byways can be destination points, or a means to reach a destination point. Scenic roads, both old and new, can be principal highways, the only route from one location to another, or winding country roads that provide an alternative to "the beaten track" or leading to nowhere in particular.

Scenic byways can be used to guide people to sites they would miss on principal highways or on their daily routes about the area. They can be used to designate local tours and might include lesser known attractions as well as the traditional tourist sites. Scenic byways may induce slower speeds and offer the motorist an opportunity to relax and soak up a little of the area's character, be that aesthetic, cultural or historic. Scenic byways provide an opportunity for roads to be used for more than simply a means to get from one place to another. In some cases, a scenic route may actually save time over rush hour traffic on a main highway.

The President's Commission on Americans Outdoors identified the value of a network of Scenic Byways as follows:

A scenic byway network complements the interstate system. It offers the traveller the chance to take a scenic route for a portion of his or her trip, yet return to a major expressway to complete the trip. Intersecting scenic and major travel roadways lessen the need to develop extensive facilities and traveller amenities along the scenic routes.

It is the intent of the State of New Hampshire to identify a plan for Scenic Byway development in the State. The State will identify the route locations, and the cultural, historic and aesthetic features along each route. Individual attractions and businesses along each route may be encouraged to use the Scenic Byway routes as part of their advertising programs. The principal objective of the State will be to identify the appropriate routes. Commercial enterprises may "piggy back" on this program by purchasing advertising in a Scenic Byway directory or guidebook, or by cooperating with local travel and tourism promoters and chambers of commerce in regional publications that feature the Scenic Byway route or routes. It is not the intent of the State of New Hampshire to directly promote individual commercial enterprises, but to provide an opportunity to enhance the local economic environment by highlighting the more cultural and aesthetic features of the region. Businesses in the region will benefit from increased recognition and travel in the area.

The President's Commission on the American Outdoors reports that nearly half (43 percent) of American adults drive for pleasure. In 1985, over seven percent of Americans' personal consumption was in recreation. Total recreation expenditures in the United States were \$185.7 billion (National Income and Product Analysis of the U.S., 1985, U.S. Department of Commerce).

One third (32.6 percent) of all trips of 100 miles or more, made in the United States in 1988, were to visit friends or relatives. Another third (36.8 percent) were for other pleasure purposes ("1988 Review of Travel in America", U.S. Travel Data

Center). In 1988 Americans spent \$1,139 per capita on travel and recreation. Travel and recreation expenditures in New Hampshire were sixty percent greater at \$1,896 per capita (National Travel Survey, 1988, U.S. Census of Transportation). The New Hampshire Office of Vacation Travel reports that New Hampshire is ranked the sixth most dependent state in the nation for its dependence on travel and tourism for the stability of its economy.

II. METHODOLOGY

The objective of this case study is to determine the impact of the Kancamagus Highway Scenic Byway on the travel and tourism industry through an analysis of economic and social data and on-site surveys and interviews. Among the data sources consulted were the U.S. Bureau of the Census, U.S. Travel Center, local and state government offices, representatives of the travel and tourism industry and local master plans. This analysis will then be applied to determine the potential benefits of designating one or more Scenic Byways in the Lake Sunapee area. An analysis of the economic and social implications of tourism in the Sunapee area is included in this study. Travel and tourism studies and plans produced in New Hampshire over the past thirty years have been reviewed to identify trends and patterns in the Kancamagus Highway and Lake Sunapee areas as well as statewide.

A survey is being conducted of highway users' travel plans and activities in the Kancamagus Highway area and the Lake Sunapee area. A single survey format was prepared for use in both areas, with the first three questions tailored to the area of distribution. Surveys distributed in the Kancamagus Highway area are colored green. The first three questions ask whether the respondent has travelled on the Kancamagus Highway, whether he was familiar with the Kancamagus Highway before coming on this trip and how he first learned about the area. Surveys distributed in the Lake Sunapee area are colored blue. The first three questions ask whether the respondent has ever travelled in the Lake Sunapee region, whether he had previous knowledge of the area before coming there and how he heard about the region.

Surveys are being distributed in four locations around the Kancamagus Highway. These locations are as follows:

1. I-93 White Mountain Gateway Chamber of Commerce Information Center, I-93 Exit 28, Campton, NH;
2. White Mountain Attractions Association Information Center, I-93 Exit 32, Lincoln, NH;
3. Saco Ranger Station Information Center, National Forest Service, White Mountain National Forest, Kancamagus Highway (N.H. Route 112), Conway, NH; and
4. Intervale Scenic Overlook Rest Area, New Hampshire Department of Transportation, N.H. Route 16/U.S. Route 302, North Conway and Bartlett, NH.

Surveys are being distributed in six location around Lake Sunapee. These locations are as follows:

1. Mount Sunapee State Park, North Peak Lodge Information Center, Newbury, NH;
2. Town of Sunapee Information Booth, N.H. Route 11/103B, Sunapee, NH;
3. Dexter's Inn and Tennis Club, Stagecoach Road, Sunapee;
4. Hospitality Motel, N.H. Route 103, Newbury;
5. New London Chamber of Commerce Information Booth, Main Street, New London, NH; and
6. Town of Newbury Information Booth, Route 103, Newbury.

Surveys and collection boxes have been placed in information distribution areas with maps and travel attraction brochures or in hotel/motel/inn registration areas. Visitors complete surveys on a voluntary basis, though information center staff and lodging facility managers have been urged to encourage visitors to take a few moments to assist the State of New Hampshire in the Scenic Byways Project. A brief explanation of the project is provided on the survey collection boxes placed at each collection center.

Surveys are being collected from each location every two to three weeks and returned to the New Hampshire Office of State Planning for tabulation and analysis. Surveys were first placed

in the Kancamagus Highway area on June 18, 1990 and in the Lake Sunapee area on June 28, 1990. Surveys and collection boxes will remain in these locations through early August in order to maximize the number of responses for data analysis. Intermediate reports of survey responses will be made prior to the final analysis. Survey collection box "hosts" have generally been enthusiastic about this project and have expressed interest in the results of the surveys and the Scenic Byways Project in general. The results of these surveys will be discussed in the final version of this report.

A Scenic Byways Task Force will be assembled for a one day workshop meeting to be held on July 18, 1990, in Concord, New Hampshire. Participants in the meeting will be from the six travel regions in the state, business, cultural and historical associations, and representatives of the State of New Hampshire Department of Transportation, the Department of Arts, Libraries and Historic Resources, the Office of State Planning, the Department of Resources and Economic Development/Office of Vacation Travel, and the Federal Highway Administration. The workshop will be used as an opportunity to introduce the concept of Scenic Byways to representatives of a variety of interests, and to gather input from them about their interest in the program. Participants will be asked to discuss their interest in the program, how it might be implemented in New Hampshire and how it might benefit the state's travel and tourism industry as well as bring recognition to the state's valuable natural, cultural and historic resources. The results of this workshop will be included in the final version of this report.

Through the data analysis, survey results and comments from the Task Force Workshop, the potential benefits of identifying and designating Scenic Byway routes can be assessed. The implications

of a Scenic Byways program and how it can be used to promote the travel and tourism industry will be determined in the final report.

III. AREA PROFILES AND ANALYSIS

A. Introduction to the Kancamagus Highway Area

The Kancamagus Highway is a 34 mile section of N.H. Route 112 running through the White Mountain National Forest, between the Pemigewasset River in Lincoln and the town of Conway. The Kancamagus Highway is one of the region's best known scenic drives.

The Kancamagus Highway is named for the mountain along whose side it clings and an Indian chief who once ruled the territory. The highway climbs nearly 3,000 feet as it crosses the flank of 3,700 foot Mt. Kancamagus. The mountain was named by the State's geologist in 1876 to memorialize an early Indian of the Penacook Tribe. The Penacook Indians, a tribe of the Algonquin nation, were early inhabitants of what would later become New Hampshire. As white explorers and settlers pressed into the area, history relates that Kancamagus tried to encourage peaceful coexistence between the Indians and the whites. However, the complexities of the interactions of Indians and white settlers eventually led to harassment, hostile confrontations, war and bloodshed. Kancamagus, the "Fearless One", was reportedly a son or nephew of Wonalancet and grandson of Passaconaway, for whom a neighboring mountain and a now abandoned settlement along the Kancamagus Highway were named. While better known now for the highway named after him, Kancamagus made his mark in New Hampshire history when he led a raid on Dover, then known as "Cocheco", in 1689 in which many of that settlement's original inhabitants were killed and much of the village burned. In the years that followed, the Penacook tribes became scattered, many moving further north in New Hampshire or into Canada.

What is now the Kancamagus Highway was first laid out in 1837 as a town road to the settlement of Passaconaway, a distance of

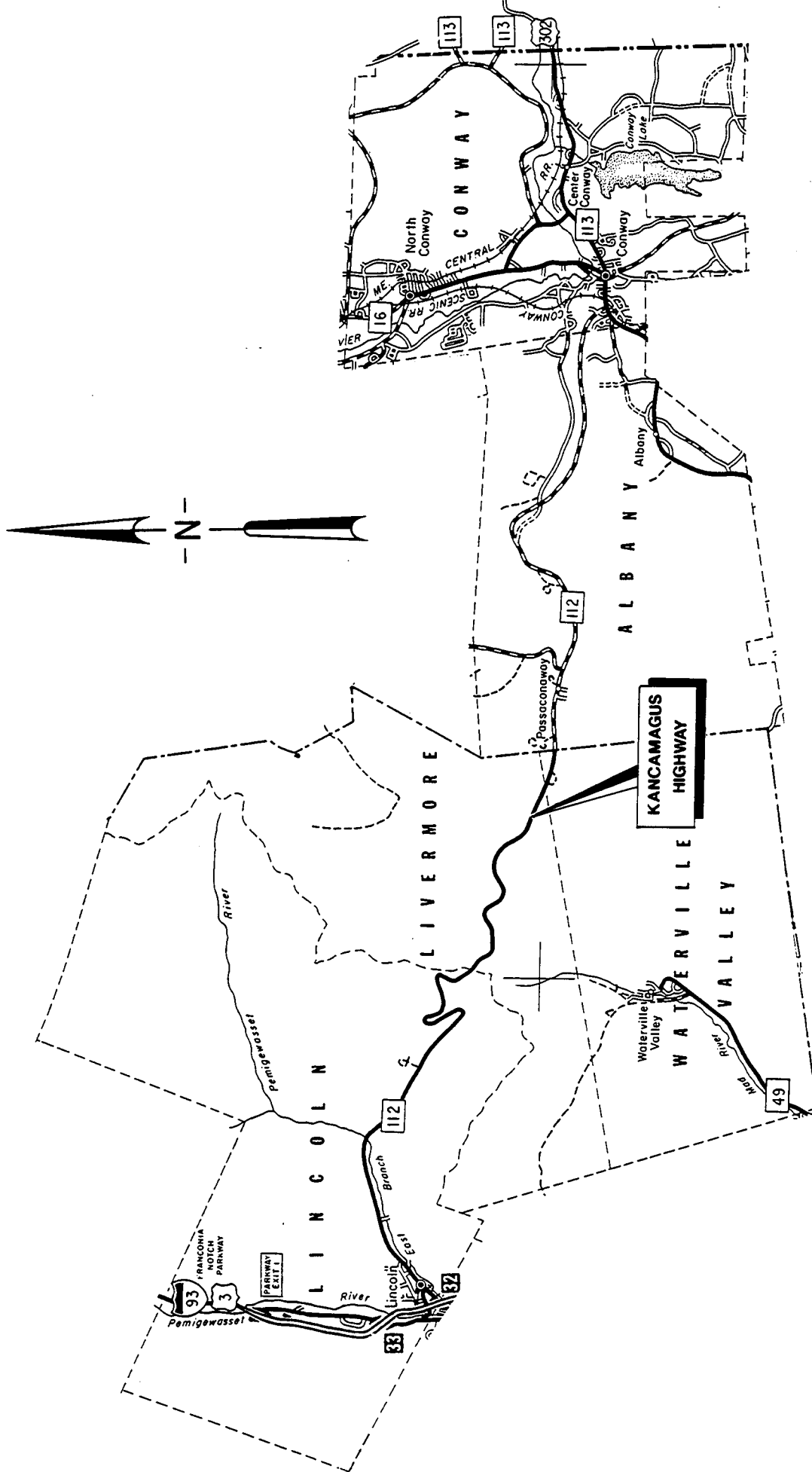
about fourteen miles from the village of Conway. The early residents of Passaconaway farmed the valley of the Swift River, logged the forests and took in summer boarders. Activity in this settlement peaked about 1900. The Russell-Colbath House and a small cemetery are maintained at Passaconaway today, by the U.S. Forest Service and the Town of Albany, as reminders of earlier days.

In the early 1900's the United States Congress passed the Weeks Law, providing Federal money to purchase private lands. Years of uncontrolled logging, together with frequent forest fires had taken their toll on the forests of the White Mountains area. Citizen concern for the forests led to passage of the Weeks Law allowing the creation of the White Mountain National Forest. Following the establishment of the National Forest, the Forest Service maintained the fourteen mile section of road, known as the Swift River Road, from Conway to Passaconaway with Forest Highway funds, unemployment relief and Civilian Conservation Corps labor and equipment.

From Lincoln, a logging railroad built at the turn of the century followed the East Branch of the Pemigewasset River eastward for about ten miles. In 1937, a cooperative agreement between State and Federal agencies provided for the surveying of a new road layout between Lincoln and Passaconaway. Road construction from Lincoln began in 1938, following the railroad bed for several miles, then turning up the Hancock Branch of the Pemigewasset River, a total distance of about seven and a half miles. Additional sections were added to this end of the route whenever funding was available, until 1956 when only a one mile gap remained to link the long awaited highway pass. Construction began on this final section in 1956 and the pass was completed and opened to the public on August 14, 1959. The completed highway reduced the highway mileage from Lincoln to Conway by about half and opened up

a previously inaccessible territory to travellers and sight seers. The road was officially named the Kancamagus Highway in 1961, after much discussion of names. Other suggestions were the "Sherman Adams Road", named for the former governor and founder of the Loon Mountain Ski Area, and the "Lincoln Valley Highway". Paving of the entire distance was completed in 1964 with further work such as guardrails, drainage and shoulder improvements continuing on an on-going basis. In 1989 the Kancamagus Highway was dedicated as a National Scenic Byway, by the U.S. Forest Service, in recognition of its outstanding aesthetic, cultural and historic values.

Today, over 700,000 vehicles travel the Kancamagus Highway each year for business and pleasure purposes. The highway provides access for fire protection, timber harvesting and other uses that may be made of the National Forest, in addition to its scenic value. Campgrounds, picnic areas and scenic overlooks, as well as miles of hiking trails, have been developed by the U.S. Forest Service along the route. Spectacular views of the White Mountains and the Mt. Washington Valley can be seen from the 3,000 foot high pass and a number of overlooks along the route. Stops can be made along the way for picnicking, fishing, swimming, or walking at such scenic areas as Rocky Gorge on the Swift River, the old Passaconaway settlement, Sabbaday Falls, Lower Falls and the covered bridge at Albany.



NEW HAMPSHIRE'S SCENIC BYWAYS

KANCAMAGUS HIGHWAY

LINCOLN

Lincoln has long been a destination for summer tourists. Like many north country communities, it became a popular summer resort of the Gilded Age with numerous hotels and boarding houses catering to tourists, hunters and fishermen. As highway access improved and the mode of transportation changed from the train to the automobile, the large hotels were replaced by smaller motels and restaurants. The tourist industry in Lincoln was generally limited to the summer and fall seasons until 1966 when operations began at Loon Mountain for development of the year round ski and recreation center. This was the beginning of a period of explosive growth in the community, with year round vacation homes, condominiums, hotels, restaurants and retail shopping centers.

The growth in the year round population of Lincoln has not been as rapid over the past thirty years. While the State's population has grown by 79 percent and Grafton County's by 52 percent since 1960, Lincoln's population has increased by only 17 percent (Source: 1960 U.S. Census of Population and 1988 Population Estimates from OSP). Most of this housing development has been in recreation homes. A housing survey conducted by the North Country Council (NCC) in August 1985 indicated a growth in recreational housing of over 1,000 percent in the previous fifteen years. For the purposes of their study, the NCC defined "recreational housing" as year round multi-family units occupied on a seasonal basis (Source: Lincoln Master Plan, 1986). Data on population, housing, employment and income patterns will be included in the final report.

The major transportation network of Lincoln includes three main routes, Interstate 93, U.S. Route 3 and N.H. Route 112 (the Kancamagus Highway). Interstate 93 serves as an alternative to U.S. Route 3 for traffic going through Lincoln and beyond. U.S.

Route 3 follows the west side of the Pemigewasset River, running north-south. Several large commercial attractions are located along U.S. Route 3. N.H. Route 112 runs east-west through the downtown and commercially developed part of Lincoln. To the east, N.H. Route 112 becomes the Kancamagus Highway running to the Loon Mountain area and connecting Conway with Lincoln. Traffic on U.S. Route 3 and N.H. Route 112 in Lincoln has increased dramatically over the past several years. This substantial growth in traffic correlates with the growth in recreational development and tourist activity in the area. Detailed traffic count data will be included in the final report.

CONWAY

The eastern end of the Kancamagus Highway lies in the Town of Conway. Conway is made up of several village centers, the most well known of which are Conway, North Conway and Center Conway. Originally settled as a farming and logging community along the Saco River, Conway's commercial and industrial development was slow at first, but logging and granite quarrying activity increased as transportation to and from the area improved. Its early days as a stage coach center established Conway on the travel routes to and from Concord, Dover, Littleton and Portland. With the coming of the Portland and Ogdensburg Railroad in 1872, Conway became much more accessible to tourists. In 1850, artist Benjamin Champney set up his easel in the middle of North Conway's Main Street to paint the view of Mt. Washington. Commercial chromo reproduction and distribution of Champney's work helped to make the beauties of the north country known around the world. The mineral baths at Redstone were popular with summer visitors as well as the views. In the 1930's, skiing became popular, and in 1936, Carroll Reed established the Eastern Slope Ski School and with it secured Conway's future as a year round resort and recreation community. Train travel gave way to automobiles after the Second World War, allowing people to travel to the White Mountains at their leisure. The inns and large hotels of the stage and train eras were replaced by vacation homes and motels. Today, the busy community thrives on a year round flood of visitors who come not only for outdoor sports and sightseeing but for the shopping and dining opportunities that have flourished in recent years. Conway has the largest number of lodging accommodations, restaurants and commercial establishments among the towns in the Mt. Washington Valley area.

The population of Conway grew quite steadily until the 1970's when it was one of the fastest growing towns in the State. Between

1960 and 1988, Conway's population has increased by 112 percent (Sources: 1960 U.S. Census of Population, 1988 OSP Population Estimates). The Mt. Washington Valley Seasonal Population Study, conducted by Anderson-Nichols, determined that the Mt. Washington Valley population triples during the summer months.

Major transportation routes in Conway are N.H. Route 16 (North-South) and U.S. Route 302 (East-West). While traffic levels in Conway fluctuate seasonally, average daily traffic has increased by one third over the past decade, from 15,000 vehicles per day on Route 16/302 in North Conway in 1979 to 20,000 vehicles per day in 1989 (Source: NHDOT Automatic Traffic Recorder Reports).

TOURISM IN THE WHITE MOUNTAIN REGION

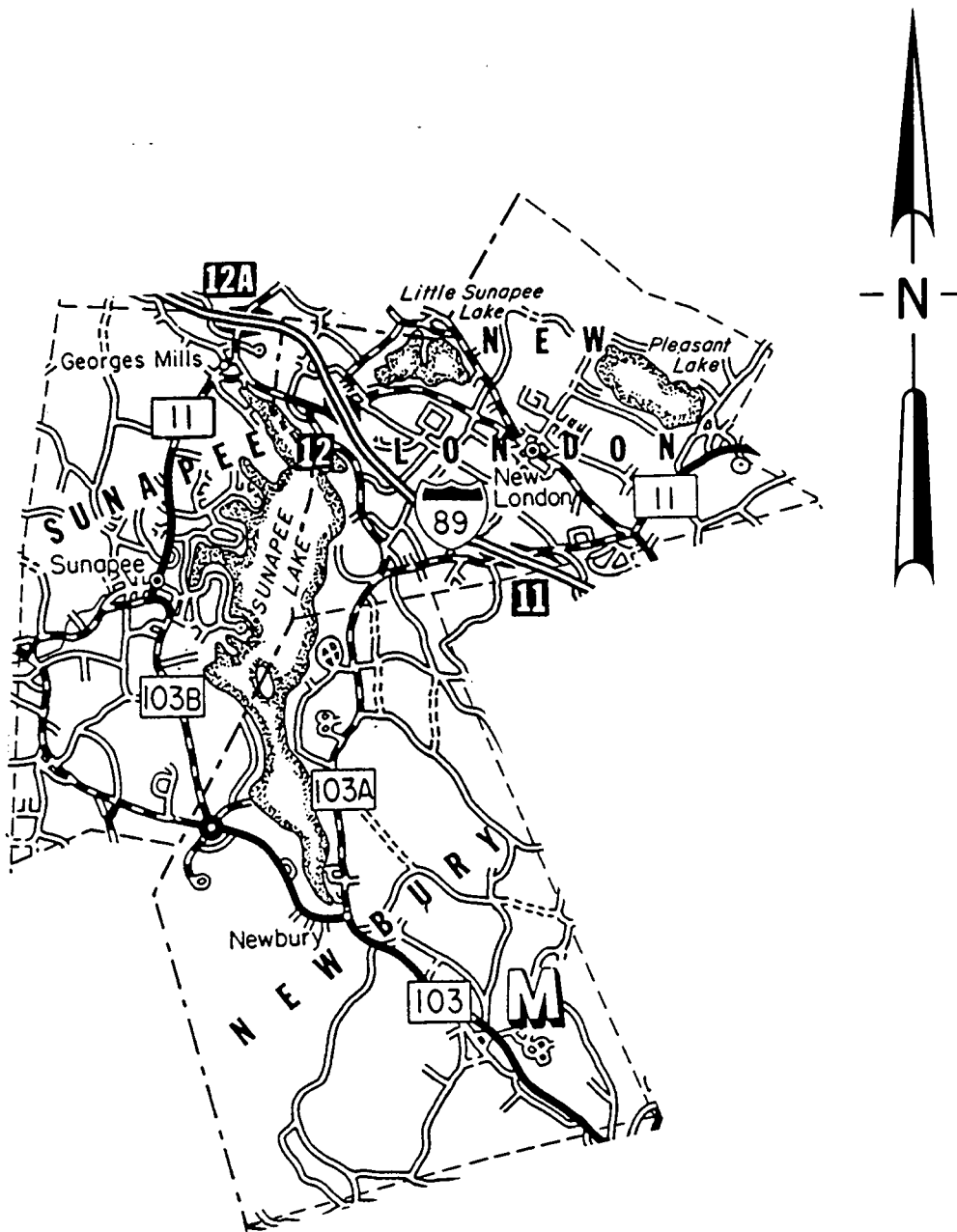
Earlier reports on the tourism industry in New Hampshire indicate that the White Mountains Region has been the State's most popular tourist destination region for many years. In a 1964 survey, the White Mountain Region was the reported destination of twice as many tourists as the second most popular region, the Lakes Region. Half of the visitors to the region stayed in hotels and motels while one in seven camped. Swimming, picnicking and camping were the most popular activities after sightseeing (N.H. State Planning Report No. 5).

A 1978 report study found that summer visitors to the White Mountain Region stayed for a shorter length of time than visitors to any other region in the State. Winter visits to the White Mountains were the longest in the State. This may be an indication that summer visitors come for a few days of camping, hiking, sightseeing and shopping, while winter visitors come for a week or long weekend of ski activities (Ebel: "Visitor Expenditure Patterns in New Hampshire").

In 1970, per capita taxable sales in eating and lodging establishments were highest in the Conway-Jackson area, more than three and one half times the statewide average. Carroll County had per capita hotel, motel and camp receipts nearly fourteen times the national average (Hendrick: "The Impact of Vacation Travel on New Hampshire").

A 1990 report on rooms and meals tax revenues showed that while the 1989-90 increases in total revenues from this source have not been keeping up with past years, the decline is not as severe in the White Mountain Region as elsewhere in the State.

commercial lake boat was launched in 1854 and was propelled by horsepower. The first steam boat, a side-wheeler was launched five years later. The largest steamer on the lake was the "Armenia White" with a capacity of 650 passengers. In 1870, the Concord and Claremont Railroad was extended into Sunapee Village, linking it directly to New York and Boston. Soon the ten mile length of Lake Sunapee was dotted with cottages, boat houses and hotels. As automobile travel became possible and recreational boats popular, the trains and steamboat lines were abandoned. Today, the M/V Mt. Sunapee and M/V Mt. Kearsarge once again provide tours about the lake.



NEW HAMPSHIRE'S SCENIC BYWAYS
LAKE SUNAPEE AREA

The above research indicates that the White Mountain Region is well established as a tourist destination. The region now has almost one third of the overnight accommodation facilities in the State and the facilities in this region offer more amenities than do others elsewhere. Tourists in this region appear to be focused on specific action oriented activities such as hiking and mountain climbing, camping, skiing, and more recently, outlet shopping. Over the past few years, Conway and North Conway have become the State's busiest outlet shopping area, with over fifty nationally recognized manufacturers and distributors of clothing, shoes, sporting goods and housewares.

During 1989 and 1990, with the softening of New England's economy, the White Mountain Region, and the rest of the state as well, have seen a slight change in the tourist population. Travellers are taking shorter trips and, particularly in 1990, are more likely to spend their time hiking and camping than partaking in activities that require additional entrance fees. The Office of Vacation Travel reports that the number of inquiries about activities and lodging in the White Mountains Region have increased in recent years, and that trend has continued this year. However, for 1990, it appears that not as high a percentage of those who make inquiries have actually come to visit.

B. Introduction to the Lake Sunapee Area

Lake Sunapee is located in the west central region of the State. This crystal clear, many lobed lake is about ten miles long and 3,000 acres in area with a number of small resort communities around its shore. Mount Sunapee (el. 2,743) rises up from the southern end of the lake. The Lake is bounded by the Towns of Sunapee, Newbury and New London, and is part of the larger area known as the Dartmouth - Lake Sunapee Region. Lake Sunapee is located on the summit divide between the Connecticut and Merrimack Rivers. It is located thirty miles southwest of Lake Winnepesaukee and 18 miles from the Connecticut River. At high water, the lake stands at 1,103 feet above sea level, 603 feet higher than Lake Winnepesaukee. The shore is mostly rocky, though there are a few sandy beaches. The lake is fed by springs and the water is so pure it has been said to be cleansing to the skin and stimulating to the nervous system. The name "Sunapee" is agreed to be native American in origin, though any number of meanings have been suggested, including "Wild Goose Water", in reference to its time as a favorite Indian hunting ground, and "A Kinder Gentler Place".

The first white settlers to this area came to Newbury in 1762, but the real development of the lake as a tourist area began with the opening of the railroad to Newbury in 1849. The first station was located in Newbury at the public dock, but was later moved about half a mile westward along the shore to the foot of Mount Sunapee. The location known as Pine Cliff in Newbury was a cottage colony popular with Concord residents, and Blodgett's Landing also developed on the eastern shore. The era of grand summer hotels peaked at the turn of the century when the Sunapee House, the Lake View House at Burkehaven and the Runnals House at Sunapee Harbor were popular vacation destinations. Steamboat companies kept a fleet of boats running between the railroad station at Newbury and the villages and large hotels around the lake. The earliest

SUNAPEE

Early development of the town of Sunapee was centered around a grist mill, saw mill, and cloth mill that used water power from the Sugar River at its outfall to Lake Sunapee. In 1868, John Smith devised a machine for the manufacture of clothespins and for a time the Town of Sunapee was home to the leading producer of clothespins. Another local resident, Enos Clough, is credited with inventing a horseless carriage in 1869, though it was banned from the street by town fathers because it frightened the horses.

The Town of Sunapee is made up of several villages: Georges Mills at the northern tip of the lake; Wendell to the west; and the harbor village of Sunapee itself. Georges Mills as the site of a grist mill that ran on power from the outfall of Otter Pond and Lake Sunapee. Wendell developed around the Emerson Paper Company and the Sunapee Depot Station, a few miles up the Sugar River from Sunapee Harbor.

A slow but steady population growth was maintained during the early years of Sunapee, falling off after the First World War as farms and manufacturing plants were abandoned. Sunapee's economy became increasingly dependent on the summer tourist and associated service industries. With the completion of Interstate 89, access to the Lebanon and Concord employment areas was improved. Together with the increasing attraction of Sunapee's recreational opportunities, this led to rapid growth in the year round population. Between 1960 and 1988, Sunapee's population increased by 139 percent, compared to Sullivan County's growth of 34 percent during the same time period. The Sunapee Master Plan of 1985 includes the assumption that the town's seasonal population, not including people staying at hotels and motels, is nearly three times the year-round population. Sunapee's 1979 median income levels are higher than Sullivan County but lower than the State as

a whole. However, the Town's per capita income is higher than both the County and the State. This indicates that Sunapee ranks higher on average compared to other towns in Sullivan County for income levels, yet is average to below average in comparison to New Hampshire as a whole. Data on population, housing employment and income will be included in the final report.

The principal travel routes in Sunapee are N.H. Routes 11, 103 and 103B. N.H. Route 11 runs east and west around the north end of the Lake to New London and Newport. N.H. Route 103 runs east and west around the south end of the lake to Newbury and New London, while N.H. Route 103B serves as a connector between the two, running along the west shore of the lake. Traffic counts on N.H. Route 11 in Sunapee show average annual increases of nine to eleven percent over the four year period from 1985 to 1989. This growth in traffic is considerably greater than the growth in traffic volumes statewide. Detailed traffic count data will be included in the final report.

The Sunapee Master Plan of 1985 reports that surveys conducted during 1984 showed that Sunapee residents favored business development in the categories of farming, woodlots, professional offices, retail shops, restaurants, home businesses and, to a lesser extent, light industry. On the other hand, heavy industry, shopping centers, rooming houses and marinas were not favored. The Master Plan points out that it was the year round residents who favored the development of motels, while seasonal and shoreline property owners were against it. While those items falling in the category of favorable development are all complementary to tourism development, the less favored marinas and motels are also necessary to support the travel and tourism industry.

NEWBURY

Newbury is best known today as the location of the Mount Sunapee State Park with its ski area and beach. Originally settled by farmers, Newbury evolved into a summer tourist destination after the Civil War when hotels were built around the railroad station and steamship landings, and farmers rented rooms to city dwellers for "farm holidays". Former Secretary of State John Hay built a summer home in Newbury. The State of New Hampshire purchased land for the Mount Sunapee State Park in the 1940's, and a ski tow was constructed bringing year round recreation activity to Newbury. Today, Newbury has a small commercial service center built up around the Town dock and boat landing at the south end of the lake. Here there are convenience stores, sporting goods, a marina, restaurants and the Town's Information Booth. The Information Booth is open daily in July and August.

Newbury's per capita income levels in 1979 were above both the State of New Hampshire and Merrimack County averages, though median household income and median family income fell below the state and county levels. Income levels in Newbury fell below those in New London and Sunapee in all categories except per capita income where Sunapee's per capita income level fell slightly below Newbury.

Traffic volumes on Route 103 in Newbury increased at an average annual rate of six percent between 1985 and 1989. Again, this is faster than the rate of increase statewide for the same period.

NEW LONDON

The Town of New London was chartered in 1779. An influx of population after the Revolutionary War led to the development of civic and industrial services, and in 1837 Colby Academy was established. Agriculture was the primary source of income for residents of New London well into the twentieth century, though the town benefited from its share of the lively summer tourist trade that developed in the area. New London's population peaked first in 1840 at 1,019 persons, then fell to a low of 701 persons in 1920, before it began its steady increase to today's level at 2,955 persons (1988 OSP estimate). The seasonal population has been estimated to be as high as 2,300 persons staying in commercial lodging accommodations and private seasonal homes. New London's median household and median family income levels are well above the Merrimack County and State of New Hampshire levels. New London's 1979 per capita income was the highest in the area, exceeding state and county levels by over forty percent.

The first hotel in New London was built on the grounds of the 400 acre Soo-Nipi Park between Lake Sunapee and Pleasant Lake. The Soo-Nipi Lodge could accommodate 200 guests in luxurious suites with hot and cold running water and working fireplaces. Music and reading rooms, a casino and a 250 foot piazza provided opportunities for indoor activities, while swimming, boating, hiking, golfing, croquet and tennis were just a few of the outdoor activities available to guests. No bar was provided and the lodge was billed as the provider of "all the luxuries and privileges of home for cultured and moral patrons only." The lodge was torn down in the 1950's and little remains of the once grand resort.

Today, New London hosts a broad variety of small shops, businesses, inns and restaurants, popular with year round and seasonal residents, as well as students at Colby-Sawyer College.

The New London Barn Theater has been renowned for its plays and musicals for over fifty years.

Traffic counts on N.H. Route 11 at the Sunapee/New London Town Line show an average annual increase of eleven percent over the period from 1985 to 1989.

The New London Master Plan of 1989 includes the results of a 1984 survey by the New London League of Women Voters. This survey found that respondents were evenly split in their favor of shopping centers and other new business and commercial development in the town. Respondents favored the development of retail shops, offices, motels, restaurants, services and home business, with restriction. Respondents preferred to see new development continue in the areas that are already developed, rather than spreading into the more residential areas.

IV. LITERATURE REVIEW

This section contains a summary of the contents and findings of a number of travel and tourism studies prepared in New Hampshire over the past thirty years. Studies are reviewed in order of their publication. In reviews of more recent studies, references have been made to patterns and inconsistencies revealed over the years of studies. Many of the earlier works in travel and tourism included user surveys. The results of the surveys conducted in the Kancamagus Highway area and the Lake Sunapee area will be compared with those of earlier research to identify further patterns in the travel industry.

In addition to the research on travel and tourism in New Hampshire, a variety of materials have been collected from other states about their scenic highway programs. Some of these materials are distributed by state travel offices and some by independent travel promotion organizations. Some deal specifically with Scenic Byways or other scenic roads programs, while others are simply regional travel promotion information. Materials distributed by the State of New Hampshire's Office of Vacation Travel and the local business and travel promotion organizations in the two case study areas have been included in this review.

A. New Hampshire Travel and Tourism Studies

1. N.H. State Planning Project, "Land Water Recreation", "Report No. 5: Travel Habits of the Motorist in New Hampshire, Part 1 - Summer", Concord, September, 1964.

This report contains a presentation of the findings of a survey of the "New Hampshire Travel Survey" distributed to motorists using highways in the State of New Hampshire during the summer of 1964. This survey was administered at points of entry to the state and on highways throughout the state. The survey was a collaborative effort of the N.H. State Planning Project, N.H. Department of Public Works and Highways, and the Division of Safety Services and State Police of the N.H. Department of Safety. Over fifty six thousand mail back surveys were distributed with a usable return rate of 24 percent. The questionnaire inquired generally about the socioeconomic characteristics of the motorist in New Hampshire, and the nature, extent and duration of his travel in the State. Surveys included questions about the travelling party (size of party, age, sex, income), and about the trip (purpose of the trip, origin and destination, length of stay, overnight accommodations, expenditures and activities). The final question asked whether the respondent preferred to travel on scenic roads, express routes or a combination of the two.

Results of the survey indicated that 34 percent of the motorists on New Hampshire highways were residents of New Hampshire, with another 32 percent residents of Massachusetts. Twenty one percent were from outside the six New England states. Twenty five percent of the respondents were travelling for work of business purposes. Forty eight percent of the respondents were on a recreational trip; 79 percent of those had been sight-seeing or driving for pleasure. Sixty one percent were on a vacation trip of eight days or more in New Hampshire. Sixty three percent of the respondents preferred to travel on a combination of scenic and

express highways, while 15 percent preferred to use scenic routes only.

The typical vacation motorist in New Hampshire during the summer of 1964 was characterized as a male individual or male head of household, with a higher than median income.

Regional destinations for recreation trips were as follows:

White Mountains	38%
Seacoast	21%
Monadnock	4%
Dartmouth-Lake Sunapee	6%
Lakes	20%
Merrimack Valley	11%

Sightseeing and driving for pleasure were the most frequently reported activities for recreation travellers, with the greatest proportion of sightseers and pleasure drivers in the White Mountains and Monadnock Regions. Other activities, in order of frequency were swimming, picnicking, boating, camping, fishing and hiking.

While 33 percent of the respondents were permanent residents of New Hampshire, 22 percent were overnight vacationers, 14 percent were seasonal or weekend residents and 11 percent were day excursionists. The largest proportions of overnight vacationers were in the White Mountains and Lakes Regions. Day excursionists were more often encountered in the Seacoast, Monadnock and Merrimack Valley Regions. Seasonal residents were most common in the Lakes Region.

Of the attractions visited, Lakes Winnepesaukee and Winnisquam were the most frequently reported (19 percent of respondents). Lake Sunapee was mentioned by four percent of all respondents and the Kancamagus Highway by only one percent. (Remember that the

Kancamagus Highway had been open for only five years at the time of this survey.)

Among survey respondents not returning to their own homes (permanent or seasonal) for the night, hotels and motels were the most common type of accommodations reported. Forty six percent of the respondents indicated they were staying in a hotel or motel, 23 percent were staying with friends or relatives, 13 percent were camping (tent or trailer), and 12 percent were staying in "housekeeping cabins". In the Dartmouth-Lake Sunapee Region, more people stayed with friends or relatives and fewer people camped, while in the White Mountain Region, more people camped or stayed in hotels or motels and fewer stayed with friends or relatives. Regional variations in accommodations were affected by the availability of each accommodation type in the different regions.

The authors of this report have cautioned that results of this survey were affected by the number of surveys distributed in each location and interpretation of the survey questions, among other factors, but that results can be used as a gauge of the characteristics of travellers and their travel activities.

2. N.H. State Planning Project, "Land Water Recreation", "Report No. 9: Economic Impact of Recreation, Vacation and Travel on New Hampshire", prepared by Systems Analysis and Research Corp., 1965.

This report is a general review and evaluation of recreation, vacation and travel activities in the State of New Hampshire. It includes an examination of the market structure and characteristics of the recreation, vacation and travel industry and relates these to services available in the State. This study is based on data from the 1963 Census of Business, supplemented by information from local and state government agencies. The findings of this study are presented on a statewide and county level.

Estimated receipts from recreation, vacation and travel expenditures in New Hampshire in 1963 were approximately \$195,000,000. It was determined that the expenditure of \$195,000,000 would generate approximately \$320,000,000 through successive rounds of spending. The study found that eighty percent of the total tourist expenditure goes to lodging, amusement, recreation, gasoline service stations, auto repair and eating and drinking establishments. Receipts and sales of these travel-serving industries increased 147 percent during the fifteen year period from 1948 to 1963. Payrolls in these industries increased 145 percent. The number of establishments in the travel-serving industry increased by 21 percent. This report determined that an estimated 175,000 seasonal home residents occupied over 36,000 vacation homes in New Hampshire, 21,700 boys and girls attended New Hampshire summer camps and the New Hampshire lodging industry had a capacity of approximately 80,000. More than 1,000 new vacation homes were constructed annually in New Hampshire in the period from 1957 to 1964.

The estimated population of New Hampshire in 1964 was 654,000 persons. The combined capacity of seasonal homes, boys and girls camps and lodging establishments represented the ability to house

a travelling population equivalent to more than 40 percent of the State's 1964 residents.

The 1963 Survey of Travel (U.S. Bureau of the Census, Census of Transportation) found that visits to friends or relatives accounted for 51 of the overnight trips away from home nationwide. The 1964 survey of "Travel Habits of the Motorist in New Hampshire" (N.H. State Planning Project, Report No. 5) found that among survey respondents not returning to their own homes (permanent or seasonal) for the night, hotels and motels were the most common type of accommodations reported. Forty six percent of the respondents indicated they were staying in a hotel or motel, 23 percent were staying with friends or relatives, 13 percent were camping (tent or trailer), and 12 percent were staying in "housekeeping cabins". The high usage of commercial lodging places and housekeeping cabins in New Hampshire emphasizes the importance of the hotel, motel and rental cottage to the State's economy.

In 1963, New Hampshire's per capita receipts for the lodging industry were 126 percent above the national average. Per capita amusement and recreational service business receipts were 50 percent above the national average. Per capita food store sales were 27 percent above the national average, the excess attributed in part to vacation and travel expenditures. While New Hampshire had only .34 percent of the nation's population and .31 percent of the nation's personal income, it had 3.98 percent of the nation's receipts for seasonal hotels, 2.98 percent of receipts for boys and girls camps, and 1.86 percent of the receipts for amusement and recreation services. This report estimated that New Hampshire's 1963 share of the total U.S. spending for recreation, vacation and travel was between 1.25 percent and 1.35 percent of the U.S. total.

A county by county breakdown of the economic impact of recreation, vacation and travel in New Hampshire showed that

Carroll County had per capita receipts from hotels, motels and camps of nearly fifteen times the national average. This can be attributed in part to the large number of boys and girls camps, but corresponds also to the finding in the N.H. State Planning Project Report No. 5 that visitors to the White Mountains Region were more likely to camp or stay in a commercial lodging establishment than to stay with friends or relatives. Grafton County and Coos County, also included in the White Mountain Region, showed per capita receipts for hotels, motels and camps of 553.6 and 466.8 percent of the national average. Per capita receipts for hotels, motels and camps were lowest in Strafford and Hillsborough Counties at 49.7 and 72.1 percent of the national average. Per capita amusement and recreation receipts were highest in Rockingham County at 477.4 percent of the national average. This might be attributed in part to beach area amusements and Rockingham Park in Salem. Per capita amusement and recreation receipts were lowest in Merrimack and Strafford Counties, at 53.2 and 48.3 percent of the national average.

The number of vacation homes in New Hampshire in 1964 was estimated at 36,800, with a total assessed valuation of \$145 million. By region, one third of the vacation homes were in the Lakes Region, with the remainder distributed evenly among the other five regions. By county, 25 percent of all vacation homes were in Rockingham County, with 14 and 15 percent in Carroll and Belknap Counties, respectively. Growth in the number of vacation homes was determined to have taken place over the period between 1957 and 1964 in areas near certain bodies of water and adjacent to winter recreation areas. Over half of the vacation homes in New Hampshire in 1964 were owned by residents of Rhode Island and eastern Massachusetts. One quarter were owned by people who lived elsewhere in New Hampshire.

3. Ebel, Claire Toner, "Visitor Expenditure Patterns in New Hampshire", prepared for the N.H. Office of State Planning, 1978.

The intent of this study was to provide an expenditure profile of the way in which an average visitor spends travel dollars in New Hampshire. The author concluded that expenditures of visitors in New Hampshire extend far beyond the confines of the vacation travel industry. Significant spending occurred at gasoline service stations, grocery stores and various retail establishments. Economic conditions which adversely affect the vacation travel industry, such as fuel shortages, were determined to have a negative impact on the many ancillary service industries.

Travel expenditure surveys were distributed at selected events and locations throughout the State during the summer and fall of 1976, the winter season of 1976-1977, the summer of 1977 and the winter of 1977-78. The surveys included questions about the travelling party (size of party, state of origin, destination region, purpose of visit and length of stay) and requested a log of expenditures for various categories including lodging, food and beverages, transportation, sporting activities, recreation and amusements and miscellaneous expenditures. The results of this survey showed that the New Hampshire travel industry serves primarily the New England market, with 65 percent of all winter respondents and 47 percent of all summer respondents coming from Massachusetts. Together, New Hampshire and Massachusetts accounted for 73 percent of the winter respondents and 61 percent of the summer respondents. Only 12 of the winter respondents and 22 percent of the summer respondents came from outside the six New England states. New York, New Jersey and Pennsylvania accounted for eight percent of the winter respondents and 14 percent of the summer respondents.

During the summer months, the longest stays were in the Dartmouth-Lake Sunapee Region, averaging 10.72 days. The shortest stays were in the White Mountains, averaging 4.24 days. The average summer visit among respondents statewide was 7.38 days. The average winter visit was 4.85 days, with the longest in the White Mountains (6.78 days in the Mt. Washington Valley and 4.99 days in the Ski-93 Region) and the shortest in the Monadnock Region (3.51 days). Average expenditures per person per day, statewide, were \$12.73 in the summer and \$20.52 in the winter. Summer expenditures were highest in the White Mountain Region at \$19.97 per person per day and lowest in the Monadnock Region at \$6.43. Winter expenditures were highest in the Monadnock Region at \$24.54 per day and lowest in the Mt. Washington Valley area of the White Mountain Region at \$18.89.

This study also includes a summary of expenditure categories (lodging, food and beverage, transportation, sporting activities and recreation and amusements) by visitor lodging type (package resort plan, day trip visitors, visitors to friends and relatives, campers, seasonal home owners and cottage renters). With the exception of day trippers and those who owned their own seasonal homes, lodging was the biggest expenditure category for summer visitors to the State. Food and beverages represented the second largest expenditure category. Among winter visitors, lodging again represented the largest expenditure category, with the exception of day trippers and those who owned their own seasonal homes. The second largest expenditure category, for all visitor types, was sporting activities, namely ski lift fees. Many visitor types spent more per person on ski lift fees than on food and beverages.

The author of this study recommended that the Office of Vacation Travel consider additional marketing activities beyond the New England Region, specifically in the New York, New Jersey and Pennsylvania area and the Mid-Atlantic Region. At the time of this

study, the Office of Vacation Travel maintained a Canadian office to promote New Hampshire tourism to Canadian travellers. The study's author recommended a reevaluation of this office as Canadian travellers appeared to constitute only a small share of New Hampshire visitors, with most of those few visitors coming in the summer months.

4. Hendrick, Paul, "The Impact of Vacation and Recreation Travel on New Hampshire - 1954, 1958, 1963, 1967, 1970" for the N.H. Office of State Planning, 1971.

This study serves as a continuation of studies prepared by the same consultant during 1969-70 and as an update to the N.H. State Planning Project Report No. 9 discussed above.

This report provides an estimate of the volume of the recreation, vacation and travel industry in New Hampshire. During 1970, at the peak of the summer tourist season, the author estimates New Hampshire's overnight visitor population probably reached as high as 665,000 persons, a number equal to almost 90 percent of the resident population. This study includes an estimate of 3,360,000 major person-trip visits and over 15,000 person-night visits to the State. The 1970 rate of expenditures for recreation, vacation and travel in New Hampshire reached a level of approximately \$338,000,000. It is estimated that twenty percent of this resulted in direct and indirect tax receipts for State and local governments.

This report includes an analysis of New Hampshire's share of the United States spending in key travel serving businesses, similar to the analysis in the N.H. State Planning Project Report No. 9, "Economic Impact of Recreation, Vacation and Travel on New Hampshire". based on the U.S. Bureau of the Census, 1967 Census of Transportation, National Survey of Travel, New Hampshire's share of the national receipts for seasonal hotels was 3.03 percent (down from 3.98 in 1963). Receipts from boys and girls camps in New Hampshire were 2.74 percent of the national total (down from 2.98 in 1963). New Hampshire's 1967 share of the total U.S. domestic recreation, vacation and travel industry receipts was estimated to be between .81 and .83 percent. The N.H. State Planning Project Report No. 9 estimated that New Hampshire's share was between 1.25 and 1.35 percent. By comparison, the State's share of the U.S.

population was only .35 percent, up from .34 percent in 1963. Personal income in New Hampshire was .33 percent of the national total, up from .31 percent.

This study reported that the 1970 taxable sales in eating and lodging establishments in New Hampshire were \$205.02 per capita. Among Counties, Carroll County ranked the highest at \$532.40 and Sullivan County the lowest at \$99.97. With the State broken down into 17 planning regions, per capita sales in eating and lodging establishments were highest in the Conway-Jackson area at \$747.50 and lowest in the Peterborough area at \$113.22.

A county by county breakdown of the economic impact of recreation, vacation and travel in New Hampshire, again an update of the N.H. State Planning Project Report No. 9, showed that Carroll County had 1967 per capita receipts from hotels, motels and camps of nearly fourteen times the national average, down slightly from 1963. Grafton County and Coos County, also included in the White Mountain Region, showed per capita receipts for hotels, motels and camps of 553.6 and 466.8 percent of the national average. Per capita receipts for hotels, motels and camps were lowest in Strafford and Sullivan Counties at 33.7 and 57.2 percent of the national average. Per capita amusement and recreation receipts were highest in Rockingham County at 458.3 percent of the national average. Per capita amusement and recreation receipts were lowest in Sullivan and Strafford Counties, at 62.4 and 46.7 percent of the national average.

5. Pfister, Richard L., "Expenditures on Vacations and Pleasure Travel in New Hampshire", reprinted from The Economics of Human Resources, Resources for the Future, Inc., Baltimore, MD, 1963.

This report is principally a discussion of two methodologies for estimating expenditures in the vacation and pleasure travel industry. These methods include analysis of Census of Business data for New Hampshire firms and a comparison of New Hampshire per capita sales with New Hampshire per capita consumption. These methodologies would be useful in assessing the economic impacts of tourism on a statewide level, but are based on data that is not available on the county, region or local level for more specific regional analyses within the State.

6. "Special Report on Meals and Rooms Tax", State of New Hampshire, Department of Administration, January 1990.

This special report was prepared to evaluate the growth of the Meals and Rooms Tax assessed by the State of New Hampshire, during the slow down of the New England economy of 1988-90. This tax grew at an annual rate of greater than ten percent through the 1980's as the economy in New Hampshire boomed. In recent months, with the slowing of the economy, this tax has shown little or no growth. The impact of this loss in revenues is critical to the State because of the State's dependence on the travel and tourism industry. In the White Mountain area, Grafton and Carroll Counties showed fall 1989 revenues greater than previous years, but at a slower rate of increase than usual. Merrimack and Sullivan Counties have showed total revenues from this tax less than previous years, thereby displaying negative rates of growth. Tax revenues from lodgings alone showed actual decreases from previous years in Cheshire, Merrimack, Strafford and Sullivan Counties.

7. Davidson-Peterson Associates, Inc., "The New Hampshire Growth Model", York, Maine, April 1988.

The New Hampshire Department of Resources and Economic Development commissioned Davidson-Peterson Associates, Inc. to develop a tourism growth model, specific to New Hampshire, to be used in on-going modeling and projections of the industry. This model will be used for monitoring and assessing the impact and effectiveness of various promotion programs used to attract new visitors to the State.

This model includes projections of the number of visitors expected in New Hampshire, total sales generated, full time jobs created, personal income from new employment and revenues to State and local governments (through rooms and meals taxes, liquor and sweepstakes sales, turnpike tolls, motor fuels and business profits taxes). A model has been constructed using different party sizes, lengths of stay, types of lodging and destination to illustrate the annual impact of the tourism industry. Six different itineraries have been developed for a variety of travel party sizes and destinations to illustrate this model. If an additional 200,000 visitors were to come to New Hampshire annually, in 89,605 travel parties and spend an average of three nights and four days, their net economic impact to the State government alone would be over \$6 million. They could be expected to generate sales of \$83 million and additional personal income of \$26 million to residents of the State .

The authors have suggested a revolving fund to be used for tourism promotion activities which would in turn generate additional revenues to the State to replace the original fund. An investment of \$1.5 million could result in a net return of \$22 million to the State of New Hampshire, over a period of five years, based on the Davidson-Peterson Model.

8. Davidson-Peterson Associates, Inc., "The New Hampshire Tourism Marketing and Development Strategy, Year One: 1988", York, Maine, February 1989.

The Tourism Marketing and Development Strategy is the second element of a two year N.H. Department of Resources and Economic Development program to evaluate the role of tourism in the State's economy and the potential for growth in this sector, and to develop a strategy that will allow New Hampshire to compete for an increased share of the travel and tourism market.

Davidson-Peterson Associates determined that potential for attracting more tourists to New Hampshire did exist, but that education of potential visitors, or "marketing", would be necessary as New Hampshire's image was not as clearly defined as that of its neighboring - and competing - states. Among study groups in Connecticut, New York and Pennsylvania, participants believed that New Hampshire lacks any unique characteristics to distinguish it from other vacation destinations. Vacationers in the sample study groups were attracted to areas with "ready-made" activities and entertainment, particularly if children were included in the travelling party. It was their impression that neither action-oriented activities, nor cultural and nightlife activities existed in New Hampshire. The perception of New Hampshire was that there was nothing to do there. (It is interesting to note that "driving for pleasure" and sightseeing were the most popular vacation activities in the United States twenty or thirty years ago, but today vacationers would rather be spoon fed from a smorgasbord of more commercial action-oriented activities.)

9. Davidson-Peterson Associates, Inc., "The Economic Impact of Expenditures by Tourist on New Hampshire: 1988", York, Maine, February 1989.

This report is the third step of the New Hampshire Tourism Strategy Project commissioned by the N.H. Department of Resources and Economic Development. The intent of this element was to measure the economic impact of tourism in New Hampshire during 1988 by measuring the benefits derived by State and local governments, business and residents from the dollars spent by tourists. The results of this analysis will provide a base for expansion of the industry and guide the determination how best to promote New Hampshire Tourism.

An inventory of all lodging accommodations in the State was developed for use in a Business Activity Survey distributed throughout the State during 1988. Business were asked to distribute surveys to visitors at specific periods during the year. Visitors were asked to provide information about their travelling party, origin and destination, length of stay, activities and expenditures.

This research confirmed that New Hampshire is primarily a summer vacation destination. More than one third of all tourist expenditures were made during one quarter of the calendar year, the months of June, July and August. Expenditures for winter vacations during January, February and March, were proportional to the share of days in the period; one quarter of the years tourist expenditures were made during those three months representing one quarter of the year. The fall season, September through December, represents one third of the year, but only one fifth of the year's tourist expenditures were made during that time period.

The largest expenditure category was for food, outweighing lodging by over 75 percent. (Earlier studies by the N.H. State

Planning Project and Claire Ebel, reviewed above, revealed higher expenditures in the lodging category than for food and beverages.) Proportionally, the White Mountains Region accounts for 35 percent of all estimated tourist expenditures, while the Dartmouth-Lake Sunapee Region accounts for only 11 percent. The White Mountain Region has almost one third of the accommodation spaces (hotel/motel rooms, cottages/cabins/condominiums and campsites) in the State, while the Dartmouth-Lake Sunapee Region has only five percent. (Proportionally, it might be assumed that the Dartmouth-Lake Sunapee Region is "getting more mileage" out of their lodging facilities than the White Mountain Region. However, earlier studies found a disproportionate number of seasonal homes in the Dartmouth-Lake Sunapee region, an accommodation type not covered in the Davidson-Peterson analysis.)

A survey of lodging accommodations found that the on-site facilities and amenities normally offered to tourist staying in hotels, motels and resorts in major tourism destinations are generally lacking in New Hampshire. The lodging stock is dominated by smaller, independently owned facilities offering tourists little more than basic overnight accommodations. The availability of tourist amenities is highest among the White Mountain properties. These amenities include tennis courts, an indoor pool, games areas, and health and exercise facilities. The authors suggest that more full-service accommodations might attract more conference and convention business, introducing more people into the State who might then return for vacations.

This report also includes a series of trip and traveller profiles for different party sizes, seasons and destinations illustrating traveller characteristics, activities and expenditure patterns.

B. Scenic Routes Promotional Materials

The following pages are a review of the materials distributed by the travel and tourism agencies of New Hampshire and other states. Some states have specific maps and guides to Scenic Byways and other scenic routes, while others include some information on scenic routes in their general promotional package.

1. New Hampshire

The "New Hampshire State Map", recently renamed the "New Hampshire Tourist Map", is distributed by the New Hampshire Department of Resources and Economic Development. Older editions of the map included listings of scenic drives in each of the state's six travel regions. For 1989 and 1990, scenic drives and radio stations have been replaced by directories of automatic teller machine locations. Scenic drives were included in the Office of Vacation Travel's new publication for 1990, "The Official New Hampshire Guidebook", as part of the "Visitors Guide" included in the Guidebook and also published separately. Scenic drives are simply listed by town and route number as they were on the earlier editions of the State Map, with no descriptive text or identifying attractions. Scenic drives are not indicated on State Maps in any way.

In 1982, the N.H. Department of Resources and Economic Development with the cooperation of the New Hampshire Department of Public Works and Highways and a grant from the Federal Highway Administration published the "New Hampshire Bicycle Map" identifying suitable bicycle touring routes around the state. Bicycle routes were selected both for their suitability for bicycle travel and their aesthetic qualities. Both the Kancamagus Highway and the Lake Sunapee loop road (N.H. Routes 103/103B/11/103A) are included on the map.

"New Hampshire Tourist Map", undated (distributed Summer 1990).
"The Official New Hampshire Guidebook", 1990.
"New Hampshire Bicycle Map", 1982.
New Hampshire Office of Vacation Travel
New Hampshire Department of Resources and Economic Development
105 London Road
P.O. Box 856
Concord, NH 03301
603-271-2666

In June 1990, the Manchester Union Leader/Sunday News published a special summer activity supplement entitled "New Hampshire Vacations ... A Guide to Leisure Activities". This guide included a calendar of regional events, fairs, festivals and sporting events. A directory of historic and cultural attractions as well as recreation activity sites was included, as well as a number of articles about leisure and recreation opportunities around the state. The guide listed a wide variety of activities around the state, though the Dartmouth - Lake Sunapee Region was poorly represented. Among the sixty "Granite State Attractions", only one was from the Dartmouth/Lake Sunapee Region: Fox State Forest in Hillsborough. The "New Hampshire Events Calendar" listed 93 fairs, festivals and other events, twelve of which were within the Dartmouth - Lake Sunapee Region, but only two of those were in Newbury, New London or Sunapee.

"N.H. ... A Guide to Leisure Activities", June 17, 1990.
The Union Leader/Sunday News
Manchester, NH 03101

2. Colorado

The San Juan Skyway is Colorado's first National Forest Scenic Byway. The 236 mile loop follows state maintained highways through the San Juan Mountains of Southwest Colorado. The circuit can be completed as a day trip or a weekend jaunt, and as a circular route, travellers can begin it at any point. Mining towns and ancient ruins of the Indians are included along with the scenery. Most of the route is within the 5 million acres of the San Juan and Uncompahgre National Forests. Fishing, hiking, biking and boating are encouraged along the route. Hunting, photography and swimming in hot springs pools are other options. The National Forest Service has prepared a fold-out pocket sized brochure of the route highlighting the various natural, scenic cultural and historic attractions along the way. Specific commercial attractions are not included in the brochure, with the exception of the Purgatory Ski Area in the San Juan National Forest. Generic references are made to the availability of lodging, restaurants and shopping at locations along the route. Note: Promotion for this Scenic Byway is provided by the National Forest Service rather than the State of Colorado.

"San Juan Skyway", undated.
National Forest Service
U.S. Department of Agriculture
San Juan National Forest
701 Camino Del Rio, Suite 301
Durango, CO 81301
303-247-4874
or
Uncompahgre National Forest
2250 Highway 50
Delta, CO 81416
303-874-7691

3. Maine

"Maine Invites You" is a privately produced tourism promotion publication with features from each of the state's eight travel regions. An article entitled "Autumn in Maine" includes route directions for eleven fall foliage tours. A few natural, historic and cultural sites along each route are mentioned. No maps are included with the route descriptions and scenic routes are not identified on the highway map distributed by the same organization.

"Maine Invites You", Undated (distributed in 1990).
The Maine Publicity Bureau, Inc.
(A non-profit corporation promoting Maine's tourism industry)
97 Winthrop Street
Hallowell, ME 04327-2300
207-289-2423

4. Maryland

Maryland has published the "Maryland Scenic Routes" map which delineates the "Ocean City to Oakland" route and other scenic routes in the state. The Scenic Route system was developed to encourage both Marylanders and visitors to travel roads through areas of unique cultural and historic value and natural scenic beauty. Routes are marked with the Maryland State Flower, the Black Eyed Susan. The "Scenic Routes" map is a full sized, full color state highway map with the routes highlighted. The Office of Tourism Development offers free "O.C. to Oakland" bumper stickers for anyone who completes the Scenic Route across the state from Ocean City to Oakland. Bumper stickers are in full color and come with a certificate acknowledging participation in the Maryland Scenic Routes program. Information about day trips linking Maryland's historic, cultural and scenic attractions will be forthcoming in the next few months and will appear on future editions of the Scenic Routes map. Future editions of the Scenic Route map will also include changes and additions to Maryland's Scenic Routes based on comments from localities throughout the state.

"Maryland Scenic Routes", 1988.
Maryland Department of Transportation
in cooperation with
Maryland Office of Tourism
Department of Economic and Employment Development
217 East Redwood Street, 9th Floor
Baltimore, MD 21202
301-333-6611

Information on day trips available by calling 301-794-3517.

5. Massachusetts

"The Spirit of Massachusetts", a commercially published guidebook distributed by the Massachusetts Office of Travel and Tourism is in two parts. The first presents the state's ten tourism regions and features color photographs and essays about the highlights and history of each area, without advertising. The second part includes lists of regional attractions and guides to accommodations, restaurants and activities, with abundant advertising. A feature section on "Blazing Fall Color" includes recommended routes and timetables for viewing fall foliage by air, bicycle, bus, boat, canoe and foot as well as by automobile. There are no other specific guides to scenic roads in Massachusetts in this publication.

"The Spirit of Massachusetts Guidebook", 1990.

Published by
GTE Travel Enterprises,
GTE Discovery Publications, Inc., Bothwell, WA
for the
Commonwealth of Massachusetts
Office of Travel and Tourism
100 Cambridge Street, 13th Floor
Boston, MA 02202
617-727-3201/

6. Michigan

The Lake Michigan Circle Tour is a 1,100 mile route around Lake Michigan through Illinois, Indiana, Michigan and Wisconsin. The "Michigan Route of Lake Michigan Circle Tour" guide describes the Michigan section of the tour and is published and distributed by the West Michigan Tourist Association. The guide is published to encourage people to travel this scenic route around Lake Michigan to enjoy the sights, attractions, recreation opportunities, accommodations and restaurants available in the region. As a commercially produced publication, the guide includes specific listings of hotels, restaurants and attractions. The full color pocket sized guide includes a fold-out map of the Circle Tour route, though travellers would be advised to have more detailed maps of the area as well.

"Michigan Route of Lake Michigan Circle Tour", undated.
West Michigan Tourist Association
136 East Fulton
Grand River, MI 49503
616-456-8557

7. Minnesota

The Minnesota Office of Tourism publishes and distributes the "Minnesota Traveller", a full size, full color brochure which provides travel information for fourteen travel region in the State. Road tours, or "Minnetours", are outlined for each region with specific information about attractions along the routes. These attractions include State parks, scenic towns and villages, museums, art and theatre centers. Advertising is limited to the inside back cover. Maps in the Minnesota Traveller are simplified renderings lacking the specific detail of the Official Minnesota Highway Map. Supplemental pocket-sized brochures provide information on hotel, motel and resort lodging. Scenic auto routes are not identified on the "Official Minnesota Highway Map" published by the Minnesota Department of Transportation and the Office of Tourism.

The "Minnesota Explorer", a newspaper style seasonal publication, published three times a year, includes schedules of seasonal events, detailed articles on travel, arts and recreation activities. The Spring/Summer 1990 edition has a full page article on "Exploring Minnesota's Back Roads" which highlights some "off the beaten track" opportunities to explore the State's natural, cultural and historic resources, by car and on foot.

This year, the Minnesota Office of Tourism is promoting "Celebrate Minnesota 1990" to recognize "the hometown spirit that energizes communities across the state." Special festivals, exhibits, arts performances and sporting events will highlight the community pride, natural beauty, pioneering history, ethnic and cultural heritage and sporting enthusiasm. The Minnesota Office of Tourism is promoting family and school reunions in Minnesota as part of this celebration spirit.

"Minnesota Traveller", 1990.
"Minnesota Explorer", Spring/Summer 1990.
Minnesota Office of Tourism
375 Jackson Street, 250 Skyway Level
St. Paul, MN 55010-1810
612-297-3879/1-800-657-3700

8. North Carolina

The State of North Carolina has recently designated 31 Scenic Byways, from three to 160 miles in length. Routes were designated for their significant visible natural or cultural features, including agricultural lands, historic sites, vistas of marshes, shorelines and forests, notable geologic or other natural features. Preference is given to those corridors with land use controls to reasonable protect the aesthetic and cultural values of the Scenic Byway. The Scenic Byways program has been assigned to the Landscape Unit of the North Carolina Department of Transportation. The Landscape Unit has prepares a brief 4-page Fact Sheet about the program, how it came into being, designation criteria and guidelines and the locations of designated Scenic Byways.

"Facts about Scenic Byways", undated (distributed in 1990).
Landscape Unit (Contact: Elizabeth E. Fischer)
North Carolina Department of Transportation
P.O. Box 25201
Raleigh, NC 27611
919-733-2920

9. Utah

The Utah Travel Council, in cooperation with the U.S. Bureau of Land Management, U.S. Forest Service, Utah Department of Transportation, Utah Travel Regions, Association of Governments and the National Park Service, distributes "Utah Scenic Byways and Backways". Twenty seven Scenic Byways and 58 Backways are described, mapped and photographed in this full sized, full color brochure. This brochure contains spectacular photographs from each Byway, but Byway maps are somewhat over simplified and may be hard for unfamiliar travellers to follow. Scenic Byways in Utah are marked with uniform signage regardless of what agency's jurisdiction they fall under. Routes range in length from five to 133 miles. Most follow U.S. or state highways, though others are on unnumbered local roads. Scenic Backways venture off the beaten path and provide opportunities for back country travel. Road surfaces vary from pavement to unmaintained dirt, but the guide indicates that most routes may be travelled by passenger car. Travellers are warned to carry adequate food, water, warm clothing, spare tires, gasoline and good maps on Scenic Backways. Travellers are warned not to rely on the maps included in the guidebook as their only source. Again, all agencies with jurisdiction over Scenic Backways have agreed on uniform signage used throughout the state.

"Utah Scenic Byways and Backways", undated.
Utah Travel Council (Contact: Ann King)
Council Hall
Capitol Hill
Salt Lake City, UT 84114
801-538-1030
(in cooperation with other agencies)

10. Vermont

The "Vermont Travellers Guidebook" lists nineteen Scenic Rides and Mountain Views, some of which are roads while others are chairlifts, aerial tramways or hilltop lookout points. Maps and route descriptions are not included; this is simply a listing of road names, highway numbers and mountains. Scenic roads are not identified in any way on the "Official State Highway Map and Touring Guide", but Scenic Villages and Historic Districts are listed on the back.

"Vermont Travellers Guidebook"

Vermont Chamber of Commerce
Box 37, Granger Road, Berlin
Montpelier, VT 05602
802-223-3443

and

State of Vermont Travel Division
134 State Street
Montpelier, VT 05602
802-828-3236

"Vermont 1989-90 Official State Map and Touring Guide"

Vermont Agency of Transportation
Vermont Agency of Development and Community Affairs
Montpelier, VT 05602

11. Virginia

The "Virginia Travel Guide", a commercially published full size, full color brochure, contains no specific references to scenic routes in the state. The "Official State Map" of the Virginia Department of Transportation identifies the routes of "Virginia Byways" but includes no explanation of why they are so designated.

"Virginia Travel Guide", Fall/Winter 1989.

Published by
JWJ Enterprises, Inc., Richmond, VA
for the

Virginia Division of Tourism
1021 East Cary Street, 14th Floor
Richmond, VA 23219
804-786-4484

and the
Virginia Travel Council
(A non-profit membership organization for travel promotion)
7415 Brook Road
P.O. Box 15067
Richmond, VA 23227
804-266-0444

12. Wisconsin

Wisconsin Tourism Development has published a 144 page full size, full color guide to automobile touring in Wisconsin. The guide has directions for 23 different tours, ranging from 87 to 255 miles in length, throughout the state, highlighting tourist attractions, parks, museums, plant and factory tours, shopping opportunities, and sports and recreation sites. Full page advertising is interspersed throughout the guide. Maps in the Auto Tours guidebook are actual segments of the Official State Highway Map, but do not indicate the location of specific attractions. Some of the tours have their own signage which serves both identification and promotional purposes. Some tours have a geographic orientation with a focus on regional characteristics such as Big Water - Big Sky Country, the Southern Kettle Moraine, and the Big River and Coulee Country, while others have specific themes such as Rivers and Wildlife, Folk Art and Farms, Water Falls and White Water, and Native American History. Scenic auto routes are not identified on the "Official State Highway Map" published by the Wisconsin Department of Transportation. A separate Calendar of Events lists fairs, festivals, celebrations and sporting events from April to September 1990, by location. A Recreation Guide provides information on bicycle tours, hiking trails, bird watching, boating and canoe trips.

The Wisconsin Department of Transportation has developed "The RUstic Roads System" to preserve the state's scenic lightly travelled country roads for the leisurely enjoyment of bikers, hikers and motorists. Fifty six routes of three to 26 miles in length, with paved and unpaved surfaces have been mapped out and marked by uniform signage. A guide to "Wisconsin's Rustic Roads ... A Positive Step Backward" is distributed by the Wisconsin DOT. This guide has maps of each route and a brief text about the routes' features, as well as information about the goals of the Rustic Roads program and its designation criteria. The Wisconsin

DOT pays the cost of furnishing and installing signage. Officially designated roads continue under local control and are eligible for state aid just as any other public highway.

"Wisconsin Auto Tours", January 1990.

"Recreation Guide", February 1990.

"Calendar of Events", March 1990.

Wisconsin Department of Development

Division of Tourism Development

123 West Washington Avenue

P.O. Box 7606

Madison, WI 53707

608-266-2161/1-800-372-2737

"Wisconsin's Rustic Roads ... A Positive Step Backward", 1990.

Rustic Roads Board (Contact: Steven Coons)

Wisconsin Department of Transportation

P.O. Box 7913

Madison, WI 53707

608-266-0639

13. Prince Edward Island (Canada)

The Prince Edward Island (Canada) Department of Tourism and Parks has identified three Scenic Drives in three regions of the province. The routes range in length from the 190 kilometer (118 miles) Blue Heron Drive to the 288 kilometer Lady Slipper Drive to the 375 kilometer Kings Byway Drive and include both popular attractions and out of the way places. Each of the routes has its own identifying and directional signage. The drives generally follow the TransCanada Highway or provincial First Class and Secondary Highways, though a few side trips on local roads are included to take advantage of particular scenic opportunities. All but short distances of these drives are paved. Each of the three routes can be toured by car in a day, depending upon the number of stops and side trips made. Route maps are simplified segments of the provincial highway map. Side trips and deviations from the marked routes are encouraged. Recommended attractions include historic sites, museums, parks, theatres, wildlife areas, lighthouses and scenic lookout points. Specific for-profit commercial attractions are not advertised in the route descriptions, though references are made to local specialties such as lobster dinners, potato farms and other local industries. The full sized, full color "1990 Visitors Guide" to Prince Edward Island is a complete guide to attractions, lodging and dining facilities, with features on festivals and events, sights and activities, outdoor adventures, crafts and local industries.

"1990 Visitors Guide"

Prince Edward Island Dept. of Tourism and Parks

Visitor Services

P.O. Box 940

Charlottetown, P.E.I., Canada C1A 7M5

902-368-5555/1-800-565-0267

V. SUMMARY AND RECOMMENDATIONS

The review of travel and tourism research from New Hampshire indicates that the two study areas, the Kancamagus Highway and Lake Sunapee have been established travel destinations for over one hundred years. Over the past century, each of these areas has developed its own identity among tourists and vacationers. While the popularity of the White Mountains Region continues to grow and services and amenities in that area increase, the Lake Sunapee area has not seen the same type of development. The Sunapee area has become more of a second home community than a destination for travellers using commercial lodging facilities. Activities in the Sunapee area tend to be more water oriented and less commercial, while the White Mountain area offers major commercial attractions such as theme parks and water slides in addition to the outdoor recreation activities associated with the mountains and the National Forest.

Surveys distributed in the two study areas will provide further information on why travellers and tourists are attracted to each of these areas and what activities they participate in. Surveys asked for an indication of what features travellers would like to see included on designated scenic byways, such as views and vistas, historic sites, parks and recreation sites. Analysis of these surveys should reveal features and attractions which can be included in scenic byway routes to attract users. The results of the workshop with travel and tourism industry representatives will also provide an indication of what features should be included in scenic routes and how these routes might be used by area business associations to promote travel in each region.

The general response to the idea of designating scenic byways in New Hampshire from the travel industry, natural resource protection groups and cultural organizations has been very

positive. A number of other programs underway at this time may be complementary and should be considered for coordination with the New Hampshire Scenic Byways program. These include the Timber and Tourism Coalition and the Commission on New Hampshire in the Twenty First Century.

Further analysis of social and economic data and traffic counts from each of the study areas will be included in the final report, along with a complete analysis of survey and workshop results. From these analyses a series of recommendations will be developed for the final report. These recommendations will include suggested roadways and attractions to be included in potential Scenic Byway routes and suggestions for natural resource, cultural and historical interpretation programs to accompany those routes. An inventory and map of significant resources in the Lake Sunapee area will be included, indicating both public and private attractions and facilities.

PART II

PHASE TWO REPORT

I. INTRODUCTION

This is the second section of a two part report prepared for the State of New Hampshire to review the potential for and economic impacts of a Scenic Byways Program in New Hampshire. This report includes a case study of two areas, the Kancamagus Highway and the Lake Sunapee area, a review of travel and tourism research in New Hampshire and recommendations for program development. The Kancamagus Highway, in New Hampshire's White Mountains Travel Region, has been designated as a Scenic Byway by the National Forest Service. The Lake Sunapee area, in the Dartmouth-Lake Sunapee Travel Region, was selected as a location for developing a model Scenic Byway project on the state level.

The objective of the case study is to determine the impact of the Kancamagus Scenic Byway on the travel and tourism industry through an analysis of economic and social data and on-site surveys. With a better understanding of the impact of the Kancamagus Highway, potential impacts of a designated scenic byway in the Lake Sunapee area can be determined. A variety of travel and tourism research and related data was reviewed in the first section of this report, dated July 17, 1990 and referred to as the Draft Report. This data and literature review will not be repeated in this second section, referred to as the Final Report, but is available in the Draft Report for reference. (For the purposes of consistency the first section of this report will be referred to as the Draft Report and the second section as the Final Report, though they are two separate documents which together make up the body of work for this project.)

In addition to the review of existing data from sources such as the U.S. Bureau of the Census, the U.S. Travel Data Center, departments and divisions of the State of New Hampshire and local community planning studies, a survey was developed specifically for

this project. This survey was distributed at information centers and lodging facilities in each of the two study areas. Travellers were asked what brought them to the Kancamagus Highway or Lake Sunapee area, what their knowledge was of the area before coming there, how long they were staying and how much money they spent on different items.. In addition, a series of questions was included to determine the importance of scenic routes to travellers in making travel plans and what features were important to them on a scenic route. Over 700 surveys were completed and returned for analysis. Examples of the surveys and a list of survey distribution locations is included in the Draft Report.

This section, the Final Report, contains a more detailed analysis of secondary data introduced in the Draft Report. It contains a discussion of the preliminary results of on-site surveys collected in the two study areas. (Complete results of the surveys will be included as an addendum to this Final Report.) A summary of comments from participants in the New Hampshire Scenic Byways Workshop, held July 18, 1990, is included. Finally, this section contains conclusions and recommendations to the State of New Hampshire for proceeding with the development of a statewide Scenic Byways program.

II. TOURISM IN THE LAKE SUNAPEE AREA

The state of New Hampshire is divided into six travel regions, each with its own geographic character and atmosphere. Lake Sunapee is located in the center of the Dartmouth-Lake Sunapee Travel Region. The region is named for its most important landmarks, Dartmouth College and Lake Sunapee. There are no large cities in this region; the largest communities are Claremont (14,000 pop.) and Lebanon (12,500 pop.). The Dartmouth-Lake Sunapee Region is the third largest in the state, following the White Mountains Region and the Lakes Region. However, it ranks fifth in its share of tourist dollars spent. The White Mountains Region covers approximately 35 percent of the state's area and accounted for 35.3 percent of the 1988 estimated tourist expenditures (Davidson-Peterson Associates, Inc., 1989). The general environment for tourism in the White Mountains Region was discussed in the Draft Report. The Dartmouth-Lake Sunapee Region covers approximately 15 percent of the state, but accounts for only 11 percent of the estimated tourist expenditures. An inventory of the state's accommodations base found that the Dartmouth-Lake Sunapee Region had no more than six percent of the hotel/motel/resort rooms, cottages, cabins, condominiums or campsites in the state. In comparison, the White Mountains Region had one third of the hotel/motel/resort rooms, one half of the cottages, cabins and condominiums and one quarter of the campsites (Davidson-Peterson Associates, 1989). With one quarter to one half of the state's overnight facilities, the White Mountains Region is receiving a roughly proportionate share of the state's tourist dollars (35.3 percent). However, the Dartmouth-Lake Sunapee Region, with no more than six percent of the state's overnight accommodations is receiving 11 percent of the state's tourist dollars, a much larger relative proportion than the White Mountains Region. This may be due in large part to the number of people who own their own

vacation homes in the area, stay with family and friends, or visit the area on day trips from other regions.

Lake Sunapee itself is bounded by three towns: Newbury (estimated 1988 pop. 1,159), New London (2,955) and Sunapee (2,782). The Mount Sunapee State Park and State Beach are located in Newbury. Newbury has a small harbor area with commercial marina facilities and a number of small stores offering convenience services and sporting goods. One of the starring attractions of the Lake Sunapee area is the annual Craftsmen's Fair, sponsored by the League of New Hampshire Craftsmen. The fair at the Mount Sunapee State Park runs for nine days in early August and draws thousands of visitors from all over New England and beyond. New London is home to Colby-Sawyer College which provides art exhibits, music and theatre performances, and sporting events and facilities. In the summer there are band concerts on the New London common, a music festival at the King Ridge Ski Area and summer stock theatre at the New London Barn Playhouse. Sunapee Harbor, in the town of Sunapee, is a quaint lakeside village with restaurants, gift shops, a marina and the Town Dock. The tour boat M/V Mt. Sunapee II and the dinner cruise boat M/V Kearsarge operate out of Sunapee Harbor. Georges Mills at the north end of the lake is another of Sunapee's villages. A marina, a general store, a motel and a couple of antiques shops are located in Georges Mills. The Town of Sunapee has its own Arts and Crafts Festival in July which operates on a smaller scale than the Craftsmen's Fair at the State Park. Major sporting events in August are the Bud Light Endurance Triathlon at Mount Sunapee State Park and the Lake Sunapee Bike Race.

The New Hampshire Department of Transportation has permanent traffic counters in a number of locations in the Lake Sunapee area. Recent traffic counts for the Lake Sunapee area are shown in Table 1 of Appendix A. (All traffic count and population data are contained in Appendix A.) Not all of these locations have been in

operation every year, but annual counts are available for N.H. Route 103 in Newbury, south of Andrews Bridge, for each year beginning in 1985. During this period, the average annual daily traffic ranged from a low of 2,253 vehicles in 1986 to a high of 4,051 vehicles in 1988. Table 2 of Appendix A shows the seasonal variation in traffic for N.H. Route 103 in Newbury. The greatest volumes of traffic pass through this location during the months of July and August. The lowest traffic volumes are experienced during the winter months, particularly November, December and January. Over the course of the year, the monthly average daily traffic counts vary by approximately 60 percent. The average daily traffic at the Newbury location ranges from a seasonal high of approximately 5,000 vehicles per day in July and August to a low of 3,300 to 3,600 vehicles per day during the winter low points.

For comparison, monthly average daily traffic counts on the Kancamagus Highway in July and August are four to five times what they are during the winter months. This variance is a reflection of the fewer number of sightseeing tourists in the area during the winter months and more hazardous winter road conditions frequently found on the Kancamagus. Table 4 shows that average daily traffic on the Kancamagus Highway ranges from a seasonal high of approximately 4,000 vehicles per day in July and August to a low of 700 to 800 vehicles per day during December, January and February.

III. ON-SITE SURVEY RESULTS

A. Preliminary results of the Kancamagus Highway Area Survey

A preliminary analysis of the first set of returns from the Kancamagus Highway Area Survey was prepared by Jerry J. Vaske, Ph.D., of the University of New Hampshire Department of Leisure Management and Tourism. This analysis was based on 200 surveys completed at the four information center locations in the Kancamagus Highway area, between June 18 and July 9, 1990. From this first set of returns, it is evident that scenic byways do play an important part in the travel plans of visitors to the White Mountains area. Nearly three fifths of the respondents (58 percent) indicated that they "always" look for scenic byways when making their travel plans. Another 40 percent said they "sometimes" include scenic byways when planning vacation trips. Thirty one percent reported that they "always" travel on scenic back roads as opposed to major highways, while another 66 percent said they "sometimes" do. With 98 percent of the respondents to this survey indicating that they consider scenic routes in their trip plans, and nearly one third stating that they "always" use scenic back roads, it can be concluded that scenic routes are an important resource to New Hampshire's travel and tourism industry.

Three quarters of the respondents in the White Mountains area have travelled on the Kancamagus Highway, though only 54 percent had heard of the route before coming to New Hampshire. Approximately one third of the people who have been on the Kancamagus only learned of it when they got to New Hampshire. Most people (55 percent) learned of the Kancamagus Highway from family and friends. This was by far the most common response, with the next most popular source of information being the tourist information centers where only 12 percent of the respondents first learned about the route. Very few people first heard about the

Kancamagus Highway from highway signage, brochures, newspapers, magazines, television or radio. Word of mouth apparently has been the most effective means of spreading information about the Kancamagus Highway to the travelling public. This should be encouraged, as a personal recommendation from a known and trusted source is always the best reference. However, agencies responsible for tourism promotion should consider strategies for educating the public about this resource in promotional programs beyond the local area.

When asked what features they would consider important in the designation of a scenic byway, respondents in the White Mountains area were nearly unanimous in their preference for mountains. Ninety five percent considered mountains an important element of a scenic byway in New Hampshire. Water features were also important with rivers cited by 79 percent of the respondents and lakes by 64 percent. Cultural and historic features with a uniquely New England flavor were also important; 60 percent cited covered bridges and 52 percent named historic sites as features to be included on scenic byways.

A series of questions was included concerning the travel plans and characteristics of the travelling party. The typical travel party consisted of two adults (82 percent) and no children (65 percent). About two thirds of the parties (63 percent) tour different parts of the state while the other third (37 percent) goes to a single destination. One third of the respondents (32 percent) were on a day trip when they completed the survey, while 68 percent were vacationing in the area. These results support the assumption that most people on day trips are headed to a specific destination rather than touring different parts of the state. The average stay in the area was 3.1 nights. Among those staying one or more nights, 46 percent were staying two or three nights and 28 percent were staying four to seven nights. Of those staying

overnight, only 16 percent were staying for more than a week. Campgrounds were the most frequently named type of overnight accommodation, with 42 percent of all respondents using this type of facility. Among the respondents who were actually staying overnight, nearly half (48 percent) were staying in campgrounds. This finding is consistent with comments received from local businesses that more people are camping this year, rather than staying in hotels. Less than a third (31 percent) of those staying overnight were staying in motels or hotels, though this area was identified in the Davidson-Peterson report (February 1989) as having one third of all of the hotel/motel room in the entire state, and only one quarter of the campsites.

Popular activities included outdoor recreation, such as hiking and camping (69 percent), visiting scenic areas (66 percent), driving for pleasure (44 percent) and shopping (36 percent). The less popular activities were sports activities such as tennis and golf, and attending cultural or sporting events. The number of visitors who attend cultural and sporting events during their visit to the White Mountains will vary depending on the major events scheduled during the time period when surveys are completed. The Mt. Cranmore International Women's Tennis Championships were held in North Conway July 9 - 15, during the time this set of surveys was completed. The annual Arts Jubilee music festival was held in North Conway on July 26 and the Summer Crafts Fair at Loon Mountain was July 28 and 29. These events are likely to draw larger than usual crowds and may affect the number of people indicating that they are attending a sporting or cultural event. Ten percent answered that music or theatre entertainment was included in their travel plans. Many activities in this entertainment category can also be considered cultural events. Information center directors reported greater interest this year in hiking and camping, as opposed to activities that require entrance fees, such as water slides and theme parks.

As expected, food and lodging were the largest expenses for travellers in the White Mountains area. The average party spent \$124.58 per day, \$38.27 on food and \$38.48 on lodging (32 and 31 percent of the total expenditure). The following table shows a comparison of the average expenditures in the two study areas.

AVERAGE DAILY EXPENDITURES

	<u>Kancamagus Hwy.</u>		<u>Lake Sunapee</u>	
Lodging	\$39.48	32%	\$48.24	35%
Food	38.27	31	45.14	33
Fees	13.94	11	11.03	8
Transportation	13.13	11	10.20	7
Souvenirs	10.53	8	9.61	7
Entertainment	8.99	7	13.48	10
TOTAL	\$124.58	100%	\$137.71	100

Source: Vaske: Interim Report No. 4

The study of "Visitor Expenditure Patterns in New Hampshire" by Claire Ebel (1978) showed that lodging was the largest expense for both winter and summer visitors. Lodging expenses for 1976 summer visitors staying in hotels and motels accounted for 33 to 39 percent of daily expenditures with food averaging 31 to 36 percent. Among campground users in the 1976 survey, lodging represented only 11 percent of the total daily expenditure, but food accounted for 40 percent. In 1990, lodging accounted for 47 percent of the total daily expenditures of people staying in hotels, motels and inns. Food accounted for 29 percent of their daily expenditures. Among campground users in the 1990 survey,

lodging represented only 27 percent of the total daily expenditure, but food accounted for 32 percent. Lodging expenditures have increased significantly for both hotel/motel/inn users and campers, but food expenditures have decreased slightly. The 1990 survey shows that the average length of stay is one day longer for campers than for those staying in hotels, motels and inns. Campers spend more on transportation and souvenirs, though expenditures for entertainment and entrance fees do not differ significantly between the two groups.

Initial cross tabulations of the final returns from the Kancamagus Highway area supported the findings and analysis of the earlier preliminary data set. Most final results were within three to five percentage points of the results from the earlier analysis. The finding that 98 percent of the respondents consider scenic routes when making their travel plans remained consistent throughout the survey period. The biggest differences between the early results and the final results were in the composition of the travel party. During the latter portion of the study period, there were fewer adults and more children in the average travel party. This difference is a reflection of the times surveys were completed. Surveys in the earlier set were in place before many children has begun their summer vacations. The periods just before school ends in the spring, and after school begins in the fall, are popular travel times for people vacationing without children as the crowds tend to be somewhat smaller. Average daily expenditures increased in the second part of the survey period, from \$111 to \$125 per day. Slightly more people were on day trips (36 percent, up from 32 percent) than vacationing overnight, during the latter part of the survey period. Again, this may be a reflection of the number of families travelling during the latter part of the period. Many families with children would prefer to take day trips than to incur the expenses of overnight accommodations for several people.

B. Preliminary Results of the Lake Sunapee Area Survey

Two hundred forty two surveys were collected from the Lake Sunapee area during the period from June 28 to August 7, 1990. Surveys were placed at the Mt. Sunapee State Park, two local information centers and two lodging facilities. (Surveys were also placed on the M/V Mt. Sunapee tour boat, but were not available at the pre-arranged pick-up time and therefore have not been included in this analysis.) A preliminary tabulation of the results from these surveys indicates that scenic routes also play a part in the vacation planning of visitors to the Lake Sunapee area, though not to as great a degree as they do for visitors to the Kancamagus Highway area. One half of the Lake Sunapee area respondents indicated that they "always" consider scenic byways in making their vacation plans, while 44 percent said they "sometimes" consider scenic byways. Twenty two percent said they "always" travel on scenic back roads as opposed to major highways when in New Hampshire, while 74 percent said they "sometimes" do. With 94 percent of the respondents to this survey indicating that they consider scenic routes in their travel plans and 97 percent stating that they travel on scenic back roads, it can be concluded that scenic routes are as important a resource to the travel and tourism industry in the Lake Sunapee area as they are in the Kancamagus Highway area.

Seventy percent of the respondents from the Lake Sunapee area had heard about the Lake Sunapee Region before coming to New Hampshire. Familiarity was higher in this region than in the Kancamagus Highway study area, but this may be because the Kancamagus Highway is simply one feature in the White Mountains Region, while Lake Sunapee is much more of a focal point in the Dartmouth-Lake Sunapee Region. As with the Kancamagus Highway, most people had heard about the Lake Sunapee area from family and friends. Family and friends played an even greater part in the

education and promotion of the Lake Sunapee area than they did in the Kancamagus Highway area. Sixty five percent of the Lake Sunapee area respondents first learned about the area from family and friends, while only 57 percent of the Kancamagus Highway area respondents reported this method of education. Tourist information centers played a much less important role in promoting the Lake Sunapee area than they did for the Kancamagus Highway, though this method of promotion is relatively minor in both areas. Only four percent of the Lake Sunapee area respondents first heard about the area through tourist information centers, as opposed to the nine percent of Kancamagus Highway area respondents who indicated that was how they first heard about that area. There is relatively little promotional information from the Lake Sunapee area distributed at information centers outside the Dartmouth-Lake Sunapee Region, while promotional material from the White Mountains Region can be found throughout the state. Print media was more important in the Lake Sunapee area than in the Kancamagus Highway area. Twelve percent first learned of the Lake Sunapee area through print media - brochures, magazines and newspapers - while only nine percent of the Kancamagus Highway area respondents reported this source. Less than two percent of the respondents first learned about the Lake Sunapee area from highway signs, though six percent of the Kancamagus Highway area respondents reported this source of initial information. Again this is probably because the Kancamagus Highway is a single attraction within the White Mountains Region, as opposed to a destination region like the Lake Sunapee area. Word of mouth is still the best method of promoting the Lake Sunapee area, and should be encouraged. However, the success of print media in this area should also be commended. Agencies responsible for promoting tourism in the Lake Sunapee area should consider strategies for promotion programs that reach beyond the immediate area. Strategies should be developed to attract visitors from other parts of New Hampshire as well as from beyond the state.

Lake Sunapee area respondents indicated that mountains and water features were also important in designating a scenic byway in that area. Mountains and rivers were slightly less important in the Lake Sunapee area, though lakes were more important, presumably a reflection of the prominence of the lake in that area. Cultural and historic features with a New England flavor were of roughly equal importance in the two study areas. Back roads, farms and taverns were more important in the Lake Sunapee area, but camping areas were considerably less important.

Trip purposes differed slightly between the two areas. In the Lake Sunapee area, people were twice as likely to be visiting family or friends, more people were in the area on business, and to attend sports, music or theatre events. And although scenic roads were included in the travel plans of 94 percent of the respondents in the Lake Sunapee area, visiting scenic areas and driving for pleasure were cited as planned activities by less than half.

In the Lake Sunapee area, slightly more respondents were travelling with children, and the typical party had more adults than in the Kancamagus Highway area. Travellers in the Lake Sunapee area are more likely to be headed to a single destination than to be touring different parts of the state. Proportionally, there are more day trippers in the Lake Sunapee area than in the Kancamagus Highway area, but in both areas, overnight vacationers outweighed day trippers. Because of its proximity to population centers, the Lake Sunapee area is more accessible for day trips. The average length of stay reported by those staying overnight in the Lake Sunapee area was slightly longer than in the Kancamagus Highway area. There were one third more people staying more than a week in the Lake Sunapee area. This is probably due to the large number of seasonal homes in that area. Many survey respondents may

have been seasonal home owners in the area for several weeks, rather than vacationers staying in commercial lodging for just a few days. Three and a half times as many people in the Lake Sunapee area were staying with family and friends than in the Kancamagus Highway area, but only one fifth as many were staying in campgrounds and one fourth as many were staying in condominiums. Again, this is a reflection of the types of lodging facilities available in the Lake Sunapee area. There are far more campgrounds and condominiums available for short term rental in the White Mountains Region than in the Dartmouth-Lake Sunapee Region.

Average daily expenditures in the Lake Sunapee area were ten percent higher in the Lake Sunapee area than in the Kancamagus Highway area (\$137.71). Expenditures for lodging (\$48.24), food (\$45.14) and entertainment (\$13.48) were higher in the Lake Sunapee area, but spending in the transportation (\$10.20), entrance fees (\$11.03) and souvenir categories (\$9.61) was lower. Although more people in the Sunapee area were staying with friends and family, or on day trips, the average expenditure for lodging was higher in this area. This may be due in part to the large number of people who use inexpensive campgrounds in the White Mountains Region, but may also reflect higher overall lodging fees in the Sunapee area. More people reported attending music and theatre events in the Sunapee area accounting for the higher expenditure for entertainment.

A summary of overall frequencies from all 744 surveys, from the two study areas combined, was prepared by Jerry Vaske. This summary should be of general interest to travel and tourism planners and promoters in the state. The overall responses from the surveys show that 97 percent of the respondents "always" or "sometimes" look for scenic routes in making their travel plans and 96 percent "always" or "sometimes" travel on scenic back roads when they are in New Hampshire. This finding strongly supports the

efforts of the State of New Hampshire to develop one or more scenic byways. Visitors to the state are attracted by scenic roads, and may in turn be encouraged to stay in the state longer if scenic roads are identified for them to use. The features people look for on scenic roads are mountains (92 percent indicated they look for mountains), rivers (75 percent) and lakes (67 percent), scenic vistas (66 percent) and historic sites (55 percent). Popular activities are camping and hiking (64 percent), visiting scenic areas (59 percent), driving for pleasure (40 percent) and shopping (34 percent). Sixty percent of the respondents first heard about the Kancamagus Highway or the Lake Sunapee area from family and friends and seven percent from tourist information centers. Of those who had not heard of the Kancamagus Highway or the Lake Sunapee area before coming to New Hampshire, 43 percent first learned of these areas from family and friends in the state, 16 percent from tourist information centers and another ten percent each learned of them from highway signs and travel brochures. Word of mouth will always be the best method of promotion, but consideration should be made of how to improve promotion through other sources to reach other markets.

IV. NEW HAMPSHIRE SCENIC BYWAYS WORKSHOP

A Scenic Byways Task Force was assembled for a workshop meeting held in Concord, New Hampshire on July 18, 1990. Representatives were invited from the six travel regions in the state, business, cultural, historic and natural resource protection organizations, regional planning agencies, the New Hampshire Office of State Planning, the New Hampshire Department of Resources and Economic Development/Office of Vacation Travel, the New Hampshire Department of Transportation and the Federal Highway Administration. A list of participants is included in Appendix B. The workshop was used as an opportunity to introduce the concept of scenic byways to representatives of a wide variety of interests, to explain some of the specific goals of New Hampshire's Scenic Byways Project, and to gather input from participants about their interest in the program. Participants were asked to consider how their agencies and organizations could become involved in the State's initiative, how they might integrate a scenic byway system into their advertising and promotional campaigns, and how a system of scenic byways might benefit the state's travel and tourism industry, as well as bring recognition the state's valuable natural, cultural and historic resources. Open discussion at the workshop focused on support for a statewide Scenic Byways program, local involvement in the program, the opportunity to use scenic byways as a means of dispersing tourist dollars over a wider area and more of the calendar year, educational opportunities, public/private partnerships, nomination criteria, maintenance and protection of designated routes, and signage.

Support for Scenic Byways

The consensus among the workshop participants was enthusiasm for continuing the state's efforts at investigating the development of scenic byways in New Hampshire. Participants agreed that scenic

byways could be integrated into their local and regional tourism promotion, would provide recognition for area resources and could provide a method to spread out tourist traffic to some of the lesser known areas of the state. David Scott of the New Hampshire Office of State Planning encouraged participants to view this as both a tourism promotion tool and an economic development tool. Chris Jennings of the New Hampshire Office of Vacation Travel (OVT) pointed out to participants that this scenic byways initiative goes hand in hand with his office's efforts to promote the state's natural resources, that it is complementary to OVT's "Tourism 2000" project and that it provides a good way of dispersing the tourist dollars around the state.

Local Input

Gretchen Ziegler, of the New Hampshire Travel Council pointed out the importance of input from local communities in designating scenic routes. Local representatives and organizations are most intimately familiar with the resources in their community. While state and regional organizations may be able to help in developing promotional campaigns for scenic byways, the local groups should have the greatest input into identifying the significant resources of their community. Local communities may also play a part in maintaining the integrity of the designated routes through "adopting" a particular site and establishing land use policies to protect scenic areas and significant natural, cultural and historic resources.

Spread Tourist Dollars Throughout the State and the Calendar Year

Scenic byways could be integrated into local and regional tourism promotion, would provide recognition for area resources and could provide a method to distribute tourist traffic to some of the lesser known areas of the state. A scenic byways program might

also provide a means of spreading tourist traffic throughout the year. By identifying places to visit and things to do on specific routes all year round, visitors will be encouraged to visit scenic areas at times other than July and August or peak foliage season. Scenic byways can be used to promote New Hampshire as a year round destination, not just a place to go for foliage one week in October, or a place to spend a weekend in July or August. By promoting a range of activities throughout the year, New Hampshire can be advertised as a place with something for everyone, all year round. Family groups need not be limited to skiing in the winter or hiking in the summer. There are activities available in each of the six travel regions to suit any interest. And because of the state's size, travellers are not limited to staying in a single region during their visit to New Hampshire. Almost every point in the state is within three hours' drive of any other location.

Educational Opportunities

Tourists and vacation visitors to New Hampshire are seeking more educational activities. Visits to water slides and theme parks are still popular, but more and more adults and families are expressing an interest in learning about or experiencing something new on their vacation. Gretchen Ziegler of the New Hampshire Travel Council is also involved with the Timber and Tourism Coalition. One of this group's objectives has been to develop a series of tours to expose people to and educate them about the timber industry. These tours include tree farms, orchards and woodlots where timber growers will discuss wood production, and logging and sawmill operations where visitors can learn about harvesting and processing timber. By providing a guided route and an opportunity to educate both local residents and visitors about the New Hampshire timber industry, the Timber and Tourism Coalition will be able to serve the needs and interests of two very different segments of the state's economy.

Public-Private Cooperation

Fred Murphy of the New Hampshire Department of Transportation emphasized to workshop participants that the scenic byway program the State develops will focus more on resources than a specific industry. For example, the State might designate a scenic byway in the Lake Sunapee area. The state's map and promotional materials for this route would highlight scenic vistas, historic sites, State Parks, public recreation areas and other non-commercial features. The state might develop a map of the region indicating the location of these features and basic information about each one, and the region in general. The regional travel and tourism promotion agency, chambers of commerce or business association could adopt this map for their own promotional materials and add on hotels, restaurants, shopping areas and other commercial attractions.

Nomination Criteria

Sharon Francis of the Connecticut River Valley Resource Commission suggested that there be a nomination committee to review both the continuing appropriateness of the designated routes and the protection mechanisms established by the local communities. Mildred Beach of the Lakes Region expressed concern that nomination criteria and protection mechanisms not interfere with the needs and interests of the local business community that serves the travelling public. She warned that land use control mechanisms that prohibit development would alienate the business community and limit services available to visitors.

Responsibility for Maintenance and Protection

Participants were in agreement that a system of scenic byways in the state would provide a link for a variety of attractions and activities. However, concern was expressed that the state also

increase its efforts to preserve and protect the scenic areas it has at the present time. Mildred Beach mentioned that a number of the scenic cut-out areas along the State highways had become overgrown in recent years and that the views of lakes, mountains, valleys and farms that travellers once enjoyed from the highway were no longer visible. It was agreed that funding for this type of maintenance had been scarce, but that if New Hampshire is serious about its scenic resources, some mechanism must be found, and the commitment made, to re-open these scenic vistas.

Mike Duprey, of White Mountains Attractions, the regional travel promotion organization for the White Mountains Region in northern New Hampshire, briefly discussed the New Hampshire Yankee Trail. The Yankee Trail, which followed existing state highways, was developed as part of the 1976 Bicentennial Celebration. Capitalizing on the appeal of authentic New England atmosphere, this route was designed to attract a larger share of the 1975-76 New England tourist traffic. There are a few roadside signs left around the state from the Yankee Trail, and some people still have maps of the Trail, but the Yankee Trail route has not been maintained as such. Maps have not been updated to show changes in route numbers and highway location. Signage has not been maintained, and efforts to preserve and protect the integrity of the Trail have not been carried out. Mr. Duprey's experience has been that visitors to New Hampshire are looking for officially designated scenic routes where they will be guaranteed a certain level of quality in their sightseeing experience.

Signage

Participants in New Hampshire's Scenic Byways workshop felt strongly about the need for informational and directional signage on designated routes to inform travellers about and direct them to various attractions and accommodations along the way. It was noted

that many of the state's best attractions are somewhat "off the beaten path" and directional signage to indicate their location is critical to their survival. Advertising billboards were generally recognized to be a thing of the past and suitable for only a few areas along heavily travelled routes. However, concerns were also raised about a program of uniform signage such as that used in Vermont. Workshop participants felt that while uniform signage was desirable, Vermont's signage had become so prolific over recent years that it no longer met the original goal of reducing the amount and variety of signage on the state's roadways.

V. ECONOMIC IMPACTS OF SCENIC BYWAYS

Tourist spending provides income and profits for established businesses as well as encouraging new businesses to spring up with the hope of attracting a share of the tourist dollar. The most obvious way in which tourists affect local economies is through the purchase of goods and services. When a visitor stays to attend a theatre performance or dines in a local restaurant, he brings additional income to the community. Tourist spending may be very important to marginal businesses, particularly those in the service industry which frequently operate below capacity.

State governments also benefit from tourist spending. Fees are paid for the use of State Park facilities, for hunting and fishing licenses, rooms and meals taxes, liquor and sweepstakes purchases and highway tolls. Local governments will gain from property taxes on seasonal homes.

Determining the economic impact of a scenic byway is a difficult task. Because many scenic byways are in protected forests and parklands, the opportunities for economic activities on those routes are severely limited. National and State Parks and Forests ordinarily limit commercial enterprises within their boundaries, or restrict them completely. Therefore the direct economic benefits of scenic byways are usually felt over a much broader region. Visitors may travel on a scenic byway during the day, but their food, lodging and entertainment expenditures are made beyond the immediate scenic road corridor. These expenditures support local area businesses who employ local residents, who in turn purchase goods and services from other businesses in the region. The direct impacts of tourist expenditures associated with a scenic byway are spread out over a broad area; the indirect impacts of tourist expenditures in a scenic route's economic region are even more far reaching.

The Southeastern Research Institute, Inc. of Atlanta is conducting a study of "The Economic Impacts of the Blue Ridge Parkway" (1990). The Blue Ridge Parkway covers 470 miles in Virginia and North Carolina and attracts over 20 million visitors a year. As an attraction with national recognition, the economic corridor associated with the Blue Ridge Parkway covers well beyond the 29 counties it passes through. The Southeastern Research Institute determined that over \$1.3 billion was brought into local economies within the Parkway corridor in 1987. This is an average of \$65 per visitor or nearly \$2.8 million per mile.

The U.S. Travel Data Center conducted a case study of five designated scenic byways. For the 382 miles of roads in the study areas, traveller generated spending was estimated at \$13 million, or a little more than \$33,000 per mile. Note that this is direct traveller generated spending. This spending directly generated over \$2.5 million in payroll income and 308 jobs. The U.S. Travel Data Center will be using the results of this study to generate multipliers for determining the economic impact of scenic byways nationwide.

The travel and tourism industry was ranked the third largest retail or service industry in the United States in 1985 by the Travel and Tourism Government Affairs Council (TTGAC). It is considered the most important industry in the State of New Hampshire. The TTGAC, in cooperation with the U.S. Travel Data Center reported that New Hampshire was ranked sixth in the country (tied with Maine), in 1987, for its dependence on the travel and tourism industry. While the 1987 United States per capita expenditure for travel and recreation was \$1,139 per capita, travel and recreation expenditures in New Hampshire were 66 percent higher at \$1,896 (National Travel Survey, U.S. Travel Data Center, 1988).

Total estimated tourist expenditures contribute substantially to employment and income of New Hampshire Residents. Tourism ranks as the largest employer in the State of New Hampshire, according to the TTGAC. In 1985, the TTGAC estimated that 35,600 jobs in New Hampshire were generated by tourism. Davidson-Peterson Associates, Inc. estimated that, in 1988, total tourist expenditures directly supported 43,173 full-time equivalent jobs in the state. They reported that an additional 12,874 jobs were supported by the indirect effects of total estimated tourist expenditures. The total direct and indirect employment supported by tourist expenditures was estimated at 56,047 full-time equivalent jobs. In 1988, the State of New Hampshire Department of Employment Security reported an employed labor force of 583,000 persons in New Hampshire. Based on estimates from Davidson-Peterson Associates, as many as ten percent of these are directly or indirectly supported by the tourism industry.

The state of New Hampshire hosted over five million overnight visitors in 1988 (U.S. Travel Data Center, 1990) who contributed some \$2.2 billion to the state's economy (Davidson-Peterson Associates, 1989). According to Davidson-Peterson's analysis of estimated total tourist expenditures in 1988, slightly over half of that amount - \$1.19 billion - was from visitors who stayed in hotel/motel/resort accommodations.

New Hampshire's Kancamagus Highway is approximately 35 miles in length. Because most of it is in the White Mountain National Forest, there are no opportunities for direct tourist spending on the route itself, with the exception of site fees for National Forest Service campgrounds. The economic benefits to the towns of Conway and Lincoln, and to the White Mountains Region, are not directly proportional to the number of miles on the Kancamagus Highway. Economic benefits could not be expected to differ significantly if the route were ten miles shorter or longer than

it actually is. Even if the route were ten miles shorter or longer, the Kancamagus Highway would still be only direct route between Conway and Lincoln and would still attract drivers for its spectacular scenery. Based on the relatively conservative estimates of direct tourist spending, developed by the U.S. Travel Data Center in their study of five designated scenic roads, a very rough estimate of the economic impact of scenic routes in New Hampshire can be made. Using a figure of \$33,000 per mile, the 35 mile Kancamagus Highway might be expected to generate \$1.2 million in direct traveller related spending. For comparison, the Southeastern Research Institute estimated that tourism related expenditures associated with the Blue Ridge Parkway were equivalent to \$2.8 million per mile. At this rate, the 35 mile Kancamagus Highway would bring \$98 million into the local economic region. This figure represents only twelve percent of the total estimated tourist expenditures in the White Mountains Region in 1988. It is important to note that these figures represent gross generalities of the potential impact of designating scenic routes on local area economies.

The number of visitors attracted to a particular scenic route is related to the public's awareness of the route's existence. Construction of the Blue Ridge Parkway began in 1935, with the final section completed in 1987. Over the past 50 years, the Blue Ridge Parkway has gained national and international recognition as a scenic route. The National Park Service and the tourism promotion offices in Virginia and North Carolina have made great efforts to educate the travelling public about the scenic, cultural, historic and recreation opportunities along the route. Education about the Kancamagus Highway is not so widespread and therefore fewer people come to New Hampshire with the Kancamagus as a primary destination point. Preliminary results of the survey conducted in the Kancamagus Highway area, as part of this case study, indicate that only half of the visitors to that area knew

of the Kancamagus Highway before coming to New Hampshire. The National Forest Service has not promoted its Scenic Byways heavily although this past year partnerships were established with Plymouth and the Forest Education Foundation for a promotional campaign and informational publications. The State of New Hampshire's Office of Vacation Travel does no specialized advertising features of the Kancamagus Highway. It is labeled on the State's tourist map, but no descriptive text is included in the Official New Hampshire Guidebook or other state sponsored promotional publications. According to Chris Jennings, Director of New Hampshire's Office of Vacation Travel, "We promote it no more than Route 16, no more than any other highway." Without a more aggressive effort to educate the travelling public in New Hampshire, New England and nationwide, significant economic benefits can not be expected from the mere designation of the Kancamagus Highway as a National Forest Service Scenic Byway.

The designation of a scenic byway in the Lake Sunapee area would create the potential to attract more visitors to the area and encourage them to spend more time in the area. The actual dollar value of a designated route would depend on the dedication of its promoters and managers. If the State's Office of Vacation Travel, the regional tourism and business associations and local organizations work together to develop, promote and care for this route, there is considerable potential to attract more visitors, to keep them in the area longer, to introduce them to more of the area's attractions and to promote the recognition and appreciation of the area's unique resources. The actual dollar increase from visitors using a scenic byway will be difficult to separate from dollars already spent in the area without the scenic byway, but will be reflected in increased revenues to all tourism related businesses, lodging and dining establishments, arts and entertainment centers, recreation facilities, the State Park, etc. The survey placed in the Lake Sunapee area revealed that visitors

to the area spent an average of \$138 per day on food, lodging, activities and souvenirs. If the promotion of a scenic byways program were successful at keeping people in the area for just one half day more, these visitors could be likely to contribute an additional \$69 per travelling party to the local economy.

Davidson-Peterson Associates determined that tourist expenditures in the Dartmouth-Lake Sunapee Region were approximately \$251 million. The average two person travel party visiting New Hampshire in 1988 spent an average of \$897 during its visit to the state (Table 2, "Expenditures by Travel Party and Season", Economic Impact Model). This figure includes lodging and meals; activities and admissions; retail, liquor and sweepstakes purchases; gasoline and tolls. The summer 1990 survey for this case study found that visitors spent \$125-138 per day, with an average visit of three to three and one half days. While a direct comparison cannot be made between these figures, the Davidson-Peterson estimate of total expenditures for a two person travel party in 1988 appears to be about twice the amount reported by visitors in the 1990 survey. This may be due in part to incomplete estimations on the part of respondents in the 1990 survey or the number of people not staying overnight in the area or not using commercial lodging facilities.

VI. SUMMARY AND RECOMMENDATIONS

The review of travel and tourism research from New Hampshire indicates that the two study areas, the Kancamagus Highway and Lake Sunapee, are included in regions that have been established travel destinations for over one hundred years. Over the past century, each of these areas has developed its own identity among tourists and vacationers. While the popularity of the White Mountains Region continues to grow and services and amenities in that area increase, the Lake Sunapee area has not seen the same type of development. The Sunapee area has become more of a second home community than a destination for travellers using commercial lodging facilities. Activities in the Sunapee area tend to be more water oriented and less commercial, while the White Mountains area offers major commercial attractions such as theme parks and water slides in addition to the outdoor recreation activities associated with the mountains and the National Forest.

Surveys distributed in the two study areas provide further information on why travellers and tourists are attracted to each of these areas and what activities they participate in. Surveys asked for an indication of what features travellers would like to see included on designated scenic byways, such as views and vistas, historic sites, parks and recreation sites. Analysis of these surveys reveals features and attractions which can be included in scenic byway routes to attract users. The results of the workshop with travel and tourism industry representatives also provide an indication of what features should be included in scenic routes and how these routes might be used by area business associations to promote travel in each region.

The general response to the idea of designating scenic byways in New Hampshire, from the travel industry, natural resource protection groups and cultural organizations, has been very

positive. A number of other programs underway at this time may be complementary and should be considered for coordination with the New Hampshire Scenic Byways program. These include the Governor's Commission on New Hampshire in the Twenty First Century and the Timber and Tourism Coalition.

The designation of one or more routes in the Lake Sunapee area is in keeping with the goals established by the Towns of New London and Sunapee in their respective Master Plans. Below are a number of specific goal statements from the New London and Sunapee Master Plans which can be achieved in some part through the development of a scenic byway system in the Lake Sunapee area.

New London:

Preserve the scenic areas and natural beauty of New London.

Designate I-89 and State Roads as Scenic Corridors. (Such designation would include the requirement that an analysis of visual impacts be made for any development in the Scenic Corridor viewshed.)

Undertake an inventory of New London's visual resources.

Promote the conservation and preservation of New London's natural heritage including its wooded hilltops, streams, brooks, lakes and ponds, wetlands, agricultural soils, forests, wildlife and scenic resources.

Encourage economic expansion provided that the natural, scenic and cultural resources, the quality of life and the small town character is preserved.

Sunapee:

Protect and enhance some of Sunapee's views.

Encourage the designation of scenic roads.

Encourage organizations in Sunapee to help with park improvement projects and sponsor special events.

Encourage the protection, enhancement and renovation of significant architectural and historical resources.

Encourage efforts aimed at educating the public about agricultural techniques, food storage and processing, marketing and nutrition.

Expand the number and scope of special events in Sunapee.

The State of New Hampshire has established legislation with respect to scenic views along town roads (RSA 253, Sections 17 and 18). This law provides for designation, by Town Meeting vote, of any Town road as a Scenic Road. The purpose of a Scenic Road designation is to help protect the scenic qualities of that road. Scenic Road designation indicates the significance of unique visual qualities which must be recognized and treated with care. Designation of a road as scenic does not affect the eligibility of the town to receive State Highway Aid for construction or reconstruction in accordance with the provisions of RSA 241. Scenic town road designation does not affect the rights of any landowner to use his own property, but abutting property owners must be notified of proposed Scenic Road designation prior to Town Meeting.

Once a road has been designated as a Scenic Road, any maintenance or reconstruction work must be conducted so as to preserve any large trees or stone walls within the scenic road right of way. Only with the written consent of the Planning Board, Board of Selectmen or other Town body designated to implement this law, may large trees be cut or stone walls destroyed. On Scenic Roads, the Highway Superintendent may cut trees, shrubs or any other obstructing vegetation within three feet of the road travelled way. In the case of emergencies, the Town's Highway Superintendent or Road Agent may order the cutting of trees without the consent of the Planning Board or Board of Selectmen.

The Town of New London has designated five sections of town roads as Scenic Roads, under the provisions of RSA 231-158. In their Master Plan, they have identified eleven additional sections of town roads as potential scenic roads. New London also has identified eleven "Historic Landscape/Architectural Areas" which merit protection for their unique character. These existing and potential scenic roads and the Historic Landscape/Architectural Areas should be considered for inclusion in designating Scenic Byway sections in New London. Existing and potential scenic roads and Historic Landscape/Architectural Areas are listed in Appendix C.

The Town of Sunapee Master Plan includes a list of eight scenic vistas to be protected for the enjoyment of town residents and visitors. These vistas are listed and shown on a map of the town in Appendix D of this report.

Support for a Scenic Byways Program in New Hampshire will have to come from State and local governments, industry groups and private organizations. Political support on all levels will be necessary to provide the necessary funding to develop and support a Scenic Byways program. Because scenic byways can be an effective means of drawing tourists to the state and to less travelled areas within the state, and because they offer education and outreach opportunities for a wide variety of interest groups, this type of program should be appealing to legislators, business and industry groups, and taxpayers. Scenic byways provide a way to attract tourist dollars into the local economy while exposing visitors to unique elements of the state's beauty, culture and history. Scenic byways offer another way to attract visitors to the state, and to keep them here longer. They offer a means of drawing tourists away from the well known attractions into other parts of the state, to teach them more about the state and to encourage their respect for its special resources.

As local communities become more aware of their own unique aesthetic, cultural and historic resources, they realize the need to protect these resources for future generations. They may also recognize the value of these resources as a means to attract tourists to spend time and money in the community.

The development of a system of Scenic Byways should be of interest to local governments, planning boards, resource protection agencies, business associations and others. Program planners should use the Scenic Byways program as a means of achieving some of the goals of these bodies. By relating the goals and objectives of this program to the goals of other interests, a broader base of support can be developed and a variety of interests addressed.

Relate the specific locations and attractions of scenic byways to the established goals and objectives of existing community groups.

The State should seek to build a coalition of state and local governments, community leaders, industry groups and private organizations to work together on developing a scenic byways program. The sensitive issues of land use and development restrictions, which are bound to emerge in the process of developing a scenic byways program, will be much easier to resolve when an atmosphere of cooperation and partnership has been established between the parties involved.

The State of New Hampshire department representatives should continue to meet with the original Scenic Byways Committee and the Task Force organized for the July 1990 Workshop to share ideas and concerns about Scenic Byways in New Hampshire.

Interpretation Programs

Vacation travellers and tourists today are looking for educational experiences as well as recreational and leisure

activities. There is growing interest in interpretive programs, educational activities, learning opportunities, demonstrations and hands on involvement. This need could be served in a variety of ways. Roadside information and signage can be used to locate, identify and describe resources in the area and to provide information on self-guided tours of those areas. Regularly scheduled activity programs at nature centers, museums, and arts and craft galleries are of interest to both local residents and visitors.

Directors of cultural and historic activity centers should be encouraged to advertise their programs in publications directed at vacationers.

Chambers of Commerce and other tourist information centers should be encouraged to make available schedules of educational programs offered in the area.

Criteria

A set of criteria should be developed to govern the nomination of routes as Scenic Byways. These criteria should be broad enough to cover a variety of routes around the state. If roadway sections are to be nominated by local communities to form a regional route, individual regions may establish additional criteria as necessary to select those routes that best characterize that region. New Hampshire may wish to consider the guidelines adopted by other states for roads in their Scenic Byways programs. Designation criteria from the states of North Carolina and Colorado are included in Appendix E of this report.

Develop and adopt a set of general criteria to govern the selection and continuing designation of scenic byways.

Maintenance and Protection

Once Scenic Byways are designated and routes are published on maps for distribution to the public, there is a continuing

responsibility to maintain and protect the integrity of those routes. This includes maintenance of signage and road quality. It also includes regular review of the designated routes for their compliance with designation criteria.

If the State of New Hampshire makes a commitment to establish a system of Scenic Byways, there must be a corresponding commitment to carry out the complete promotion, maintenance and protection program.

When Scenic Byway routes are identified in New Hampshire and signage erected to designate those routes, a program for ongoing maintenance of signage and regular updating of maps and interpretive materials should be adopted.

A regular review procedure should be established for designated routes to evaluate them for compliance with designation criteria. If routes no longer meet designation criteria as a result of development, destruction of significant resources or poor maintenance of route integrity, their designation as Scenic Byways should be discontinued.

Scenic Easements

Over the past few years, many of the scenic easements purchased to protect significant views of the states mountains, lake, rivers and other vistas have become overgrown and no longer offer highway travellers the views they once did.

The State of New Hampshire Department of Transportation and Department of Resources and Economic Development should identify scenic easements and excess right of way parcels they now own and take steps to open up any scenic vistas that have become overgrown. These vistas should be considered for inclusion on designated scenic byway routes.

Signage

Distinctive signage will be necessary to identify scenic byways and provide directional information. By using a uniform symbol on all routes, maps and promotional materials, this symbol will develop broad recognition. The more exposure to the public

this symbol receives, the more recognition it will develop and the more people it is likely to attract.

Trademark signage should be developed for New Hampshire's Scenic Byways. This should include some element highly characteristic of New Hampshire and should be simple enough to be reproduced in a wide range of sizes and formats.

The trademark symbology should be used on all designated routes in the state, on maps and in promotional materials.

Partnerships: State/Local and Public/Private

A successful Scenic Byways program will depend upon broad partnerships being established involving both state and local interests. State government can play an important role in defining guidelines and developing master plans, but local communities and interest groups should be actively involved in choosing road corridors for designation. Local communities can work together to develop regional routes and regional agencies can work together to integrate those regional routes into a statewide system of scenic byways.

Industry groups should be encouraged to participate in the development of scenic byways, or to develop spur routes with a particular theme to educate visitors about their activities.

Industry groups should be encouraged to form partnerships with travel and tourism industry as a means of developing educational programs for visitors.

Construction of new roads should not be a priority objective of the Scenic Byways program in New Hampshire. Rather, the State should focus its efforts on improving, protecting and signing existing routes with outstanding scenic, cultural, historic or recreation features.

Promotion

If a program for Scenic Byways is undertaken, the New Hampshire Office of Vacation Travel and the regional travel promotion agencies of New Hampshire should feature designated

routes in their promotional materials and provide information to potential visitors about the aesthetic and educational values of scenic byways. Promotional campaigns for scenic byways must extend beyond the local and regional level to alert potential visitors of this attraction. It will be necessary to educate the public as to what a scenic byways is as well as inform them of where these routes are located. Survey results from this study indicate that visitors to the two study areas do seek out scenic routes for their travels. By providing information to travellers about scenic byways in the state, travel promoters would be addressing a known need with an interested audience.

Travel promotion agencies should seek to educate potential visitors to the state about what Scenic Byways are and where they are located within the State.

Complementary Programs

There are a number of activities underway on the state and local level which are complementary to the Scenic Byways Project. The New Hampshire Department of Resources and Economic Development is engaged in a program called "Tourism 2000", the focus of which is to develop a strategic long range marketing and development plan that ensures the maximum benefit to the state and its people from travel and tourism resources. The Tourism 2000 Committee is made up of representatives from the regional travel promotion agencies, the hospitality industry, university researchers and the media. The objectives of the Tourism 2000 program are to develop industry cooperation and coordination, develop an in-state educational program to increase awareness of the role of tourism in the state's economy, clarify the state's role in promoting tourism, develop marketing communications and coordinate marketing with the other New England States. The experience gained from Tourism 2000 in developing public/private partnerships and promoting coordinated education and marketing programs will be valuable to the Scenic Byways initiative.

The Governor's Commission on New Hampshire in the 21st Century is another state level activity, designed to perform two tasks. The Commission's objectives are to identify the elements essential to ensure a desirable and distinct way of life in New Hampshire, and to recommend measures that perpetuate these aspects amid the state's rapid growth and change. Thirteen communities have been selected from around the state to participate in the "Community Cornerstones" project. The Cornerstone Committee in each of these cities and towns has identified 21 elements, or cornerstones, that characterize the quality of life in that community and that they feel should be preserved for future generations. These cornerstones can include physical structures, historic sites, natural and environmental resources, recreation facilities and cultural activities and events. The Town of Sunapee was selected as one of the 13 communities to participate in the Community Cornerstone project. Among the cornerstones identified by Sunapee were Lake Sunapee and the unexcelled views of the lake and mountains, Mt. Sunapee State Park, the Sunapee Historical Society Museum, the M/V Mt. Sunapee II and M/V Kearsarge boats, and Wendell Marsh. Any or all of these cornerstone features could be included in designating a scenic byway.

The League of New Hampshire Craftsmen holds its eight day Annual Craftsmen's Fair at Mt. Sunapee State Park in early August. This is one of the highlight activities of the Lake Sunapee Region. This is the nation's oldest crafts fair, with exhibits and demonstrations by over 150 juried craftsmen. The League of New Hampshire Craftsmen has prepared a map of the six travel regions in the state, indicating the locations of art galleries, museums and member craftsmen whose shops and studios are open to the public. Both the Annual Craftsmen's Fair and local craftsmen's shops should be included as cultural attractions in the development of scenic byways in the Lake Sunapee area and throughout the state.

On the local level, the Town of Sunapee has established its own group to guide the town's approach to the 21st Century. Sunapee 2000 is a volunteer association of people who have expressed concern about where the community is today and where it is going. Its mission is to "bring together the people of Sunapee to work and plan for the community that is [their] home." The three principal objectives of Sunapee 2000 are to improve communications about Sunapee events, people and issues; to provide a forum for Sunapee people to express their ideas, hopes and concerns for the town's future; and to celebrate Sunapee's spirit by providing events and opportunities for the greater Sunapee community to gather and get to know one another better. Sunapee 2000 has worked closely with the Governor's Commission on New Hampshire in the 21st Century in preparing Sunapee's Community Cornerstone project.

Scenic Byways organizers should work closely with the Tourism 2000 Committee, the Commission on the 21st Century, and other groups planning programs to recognize state and local resources.

Lake Sunapee Area Scenic Byways System

What appears, at first, to be the logical route for a scenic byway in the Lake Sunapee area is the N.H. Route 11/103B/103/103A loop around the lake. However, the lake itself is only visible from two or three points on this route: the Newbury landing, George's Mills and one spot along Route 103 between the Newbury landing and the traffic circle at the State Park entrance. Other than those three locations, drivers must leave the State highway route and use local roads to go into Sunapee Harbor, Burkehaven or Blodgett's Landing to see the lake. The State highway loop around Lake Sunapee lacks any uniquely spectacular views of the lake or Mt. Sunapee to distinguish it from other highways in the State. If a Scenic Byway were to be designated around the lake, it would

have to include spur routes off of the State highways to capitalize on the scenic value of the lake and the surrounding area. As many of the area's recreation, historic and cultural attractions are not located directly on the State highway loop around the lake, these spur routes also could provide access to those attractions. Rather than a single scenic byway running from point A to point B, the Lake Sunapee area lends itself to a network of spur routes coming off of the main loop. In the White Mountains Region, a series of "spur-pikes" is provided to direct "leaf-peepers" and other visitors to scenic areas in some of the lesser travelled parts of the region ("Leaf Peeper's Guide: Autumn in the White Mountains", White Mountain Attractions, 1989).

Develop a system of scenic byways in the Lake Sunapee area using spur routes off N.H. Routes 11, 103B, 103 and 103A. Use spur routes to direct traffic to scenic, cultural or historic areas.

A Scenic Byway in the Lake Sunapee area should include a variety of features, including scenic roads, scenic vistas, historic sites, museums, art galleries and other cultural attractions, and areas for hiking, fishing, swimming and other recreation activities. While there are many of these features and activities existing in the area, a scenic byway route would provide an opportunity to "package" a number of them together in a single promotional campaign. Attractions should be coded to identify them as "scenic", "historic", "arts and handcrafts", "music or theatre" or "recreation" related attractions. By identifying attractions by type, drivers can choose a single spur featuring a variety of attractions or select attractions of a single type on several spur routes. Because this system of scenic byways would cover a relatively small area, drivers could travel all of the spur routes in a single day, or concentrate on one or two routes. A sampling of potential sites and activities to be considered for inclusion on Lake Sunapee area Scenic Byways is included in Appendix F of this report.

Develop a coding system for attractions to identify why they have been included.

Include a variety of sites and activities on each spur route.

Based on the findings of this case study, the State of New Hampshire should proceed with the development of one or more Scenic Byways in the state. This study revealed a very strong interest in scenic routes on the part of tourists and other visitors to the state. The development of a Scenic Byways program would address a known need for an interested audience. This project has provided the State the opportunity to investigate this interest, to make contacts with other interested organizations and to plant the seed for a new program to raise the public's consciousness of and appreciation for the state's unique scenic, cultural and historic resources.

PART III

VISITORS SURVEY - FINAL REPORT

Executive Summary

The Federal Highway Administration defines a scenic byway as a scenic corridor of aesthetic or cultural value. The corridor may contain outstanding scenic vistas, unusual geologic formations, dramatic urban scenes, scientific features, or other elements - all providing enjoyment for the highway traveller.

Interest in establishing a series of scenic byways has had a long history in the United States. As early as 1934, Congress set aside one percent of all federally appropriated funds for landscaping highways. The 1965 Highway Beautification Program stressed the importance of scenic easements, landscaping, and outdoor advertising. A national system of scenic byways was proposed by Congress in 1973, but was not promoted by the Department of Transportation (DOT) due to the oil embargo. In the mid-1980's, the Coalition of Scenic Highways was established and included representatives from the tourism industry, all levels of government, motor vehicle associations, environmental groups, and historic preservation interests. The first national convention for scenic byways was held in 1988, and annual meetings have continued in 1989 and 1990. Additional support for scenic highway designations can be found in the 1990 National Transportation Policy, and the 1990 DOT Appropriations Act in which Congress appropriated \$1 million for the study of scenic byways.

New Hampshire has been an active participant in this history. For example, the state has enforced, to the extent possible, the standards suggested by the 1965 Highway Beautification Act. The Kancamagus was one of 17 highways designated in 1988 as a National Forest Scenic Byway by the USDA Forest Service. Although a State level Scenic Byways program does not exist at this time, several communities have designated "scenic roads" on the local level. Finally, New Hampshire was one of only three states to receive federal funding from the 1990 Appropriations Act to study the impact of scenic byways. The project described here was funded with this money through the Office of State Planning.

To learn more about the influence of New Hampshire's scenic byways on tourists' attitudes and behaviors, a visitor survey was distributed to travellers along the Kancamagus Highway and in the Lake Sunapee Region. This report summarizes the findings from both study sites. A total of 713 surveys were obtained from the Kancamagus area, while 242 were completed in the Lake Sunapee region. Numerical as well as graphical displays of the data are presented on the following pages. The major findings and conclusions are listed below:

Major Findings:

- * Scenic byways play an important role in attracting visitors to New Hampshire. Nearly three-fifths (59%) of the Kancamagus area travellers indicated that they "always" look for scenic byways when planning vacations. An additional 39 percent said they "sometimes" include scenic roads in their trip plans. A similar pattern of responses was reported by visitors in the Lake Sunapee Region; 50 percent said they "always" look for scenic byways, and 44 percent indicated "sometimes."
- * When in New Hampshire, about a third (30%) of all respondents reported that they "always" travel on scenic back roads. Thirty-two percent of Kancamagus visitors and 23 percent of the Lake Sunapee travellers gave this response; a difference which may reflect the official designation of the Kancamagus.

- * Approximately three-quarters of the Kancamagus sample had travelled along the Highway previously, while two-thirds of the Lake Sunapee individuals had visited that region. Given the respondents stated interest in scenic byways, designating roads as scenic in the Lake Sunapee region may increase the number of visitors to that area.
- * Seventy-one percent of the Kancamagus visitors had heard of the Highway prior to visiting New Hampshire; 62 percent in the Lake Sunapee sample had heard about the region. Family and friends were the primary source of information about the Highway/region (64% - Kancamagus, 66% - Lake Sunapee). Tourist information centers (9%) and brochures (8%) ranked second and third among the Kancamagus respondents as sources of information. For those visiting the Lake Sunapee region, four percent first learned about the area from tourist information centers and seven percent heard about the region from brochures. Taken together, these findings suggest additional visitors might be attracted to the Lake Sunapee region, if promotional efforts were increased; especially through tourist information centers.
- * Mountains, rivers, scenic vistas, and lakes were considered the most important criteria in the designation of scenic byways. Over sixty percent of the respondents to both areas considered these four features important. Other criteria identified by a majority of the travellers in both study sites were covered bridges and historic sites. Farms and inns/taverns were rated least important.
- * Sixty-four percent of the Kancamagus respondents said they usually tour different areas of New Hampshire, as opposed to returning to a single destination. Among the Lake Sunapee travellers, responses were divided equally between the two categories (49% - usually visit different areas, 51% go to a single destination). When combined with the visitors' preference for travelling on back roads, this suggests that the designation of additional scenic roads would be rated favorably by many tourists to the state.
- * Consistent with other survey findings (e.g., Davidson-Peterson, 1988), outdoor recreation activities and visiting scenic areas were identified as the primary reasons for visiting New Hampshire. Forty-nine percent of the Kancamagus sample rated driving for pleasure as an important motivation; 30 percent of the Lake Sunapee individuals rated this activity as important. Among the other activities listed on the survey, shopping and visiting museums / historic sites were considered more important among Kancamagus travellers. Lake Sunapee visitors rated visiting friends and business higher.
- * Individuals surveyed at both locations planned to spend about 3 nights, on average, in the area. About a fifth were not staying overnight, while 15 percent were staying more than a week.
- * Of those who were staying overnight, 40 percent of the Kancamagus sample were staying in a campground; a finding which further supports the significance of outdoor activities. An additional 26 percent of this group were staying in a hotel or motel. Among those in the Lake Sunapee sample, 29 percent were staying in a motel, and an identical percent stayed with friends. Only eight percent of the Lake Sunapee respondents stayed in a campground.
- * The typical travel party in both samples consisted of two adults (71%) and no children (57%).

- * Lodging and food represented the largest daily expenditures when the two samples were combined (Mean = \$45.27 and \$40.90, respectively). These two expenses were slightly lower for the Kancamagus travellers, probably because more of this group stayed in campgrounds than the Lake Sunapee region visitors. On average, individuals in the Kancamagus sample planned to spend \$132.50 per day on this trip, while those in the Lake Sunapee sample reported an average daily expenditure of \$137.71.

Conclusions

- * Although the travellers in the Kancamagus sample differed statistically from those surveyed in the Lake Sunapee region on a few variables (e.g., activities engaged in and preferred lodging accommodations), the similarities between the two groups outweigh the differences. For example, two-thirds had travelled in their respective areas previously, and most had heard about the area from family and friends before visiting New Hampshire. Similarities were also evident in terms of average length of stay, party size, and average overall daily expenditures.
- * The similarities between the two samples lend support to the idea of establishing a State level Scenic Byways program. Almost all of the respondents (97%) look for scenic byways when planning vacations, and nearly as many (96%) travel scenic back roads when in New Hampshire. Agreement was also evident in terms of the criteria that should be used in the designation of a scenic byway. Mountains, rivers, scenic vistas, covered bridges, and historic sites were rated by a majority of all respondents as important. Each of these characteristics define the landscape of New Hampshire. Because most respondents travel to different areas, as opposed to a single destination, creating more scenic byways is likely to be viewed favorably by the visiting public.
- * The limited number of questions included on the survey, make projections about the economic consequences of a State level Scenic Byways program difficult. At the same time, the existing findings do suggest that such a program would have a positive impact on local economies. First, virtually all respondents expressed interest in travelling along scenic roads. Second, most visitors tour different areas of the state. Third, the average overall daily expenditures reported by Lake Sunapee region visitors were approximately equal to those reported by Kancamagus travellers (an established scenic byway). Creating a scenic byway in the Lake Sunapee region, or other similar areas, is likely to attract more visitors and increase the flow of tourism dollars into that area.

New Hampshire Scenic Byways Survey
Kancamagus Highway and Lake Sunapee Region
Combined findings (n = 955)

1. Have you ever travelled along the Kancamagus Highway / Lake Sunapee region?

23% no
70 yes
7 don't know

2. Prior to visiting New Hampshire, had you heard about the Kancamagus Highway / Lake Sunapee region?

36% no
64 yes

3. How did you first hear about the Kancamagus Highway / Lake Sunapee region?

62% Friends / Family
8 Tourist Information Center
7 Brochure
4 Highway Signs
2 Newspaper or Magazine
1 Radio or TV
13 Other
4 I have not heard about the Kancamagus / Lake Sunapee

4. *In planning vacations*, to what extent to do you look for scenic byways?

3% Never
40 Sometimes
57 Always

5. When in New Hampshire, to what extent do you travel on scenic back roads as opposed to major highways?

4% Almost never
66 Sometimes
30 Always

6. In the designation of a scenic byway, which of the following would you consider important? (Check all that apply)

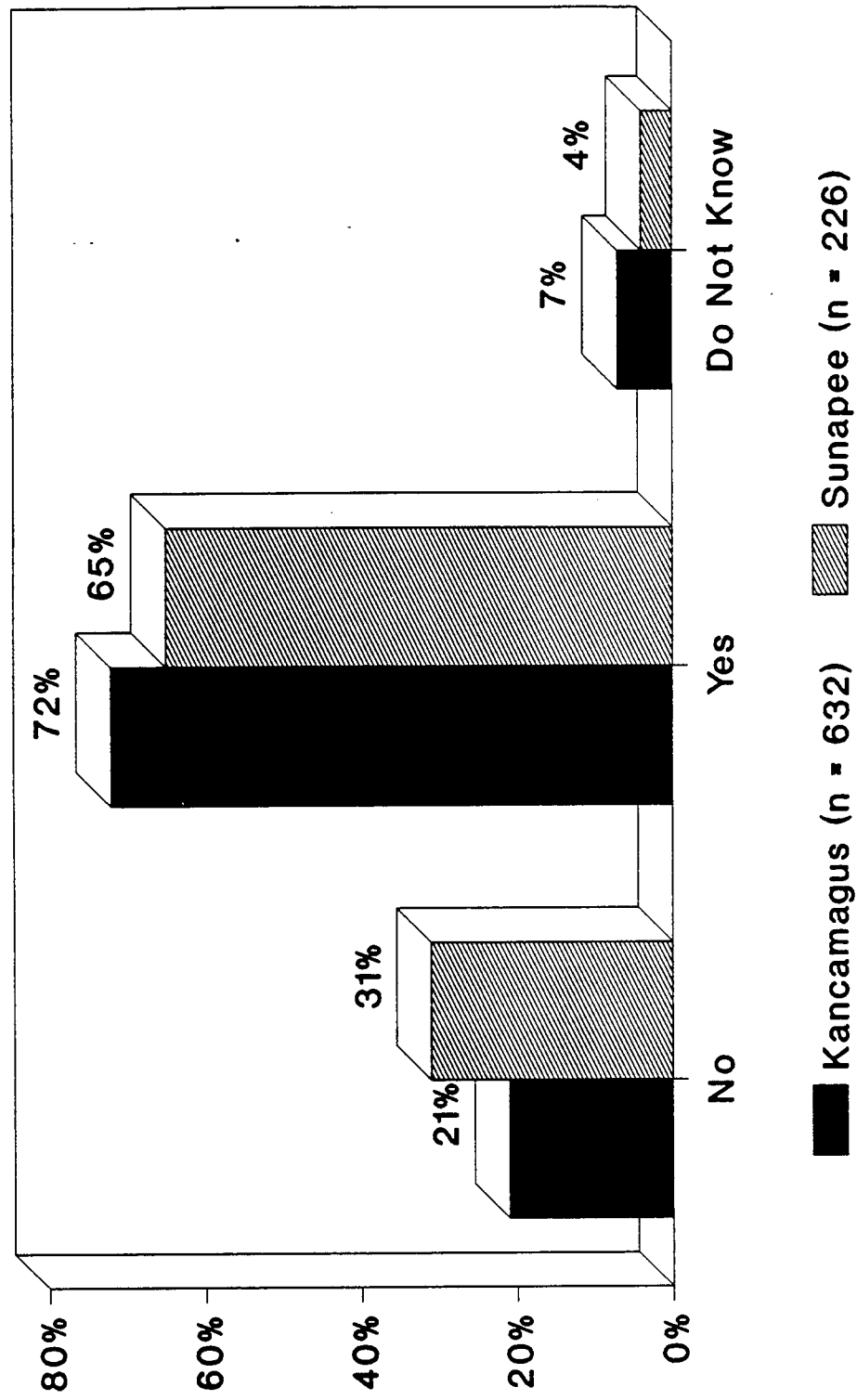
92% Mountains
75 Rivers
68 Lakes
66 Scenic Vistas
61 Covered Bridges
54 Historic Sites
49 Backroads
47 State Parks
41 Old Mills
38 Camping Areas
32 Stonewalls
30 Farms
26 Inns & Taverns

7. When visiting New Hampshire do you *usually*:

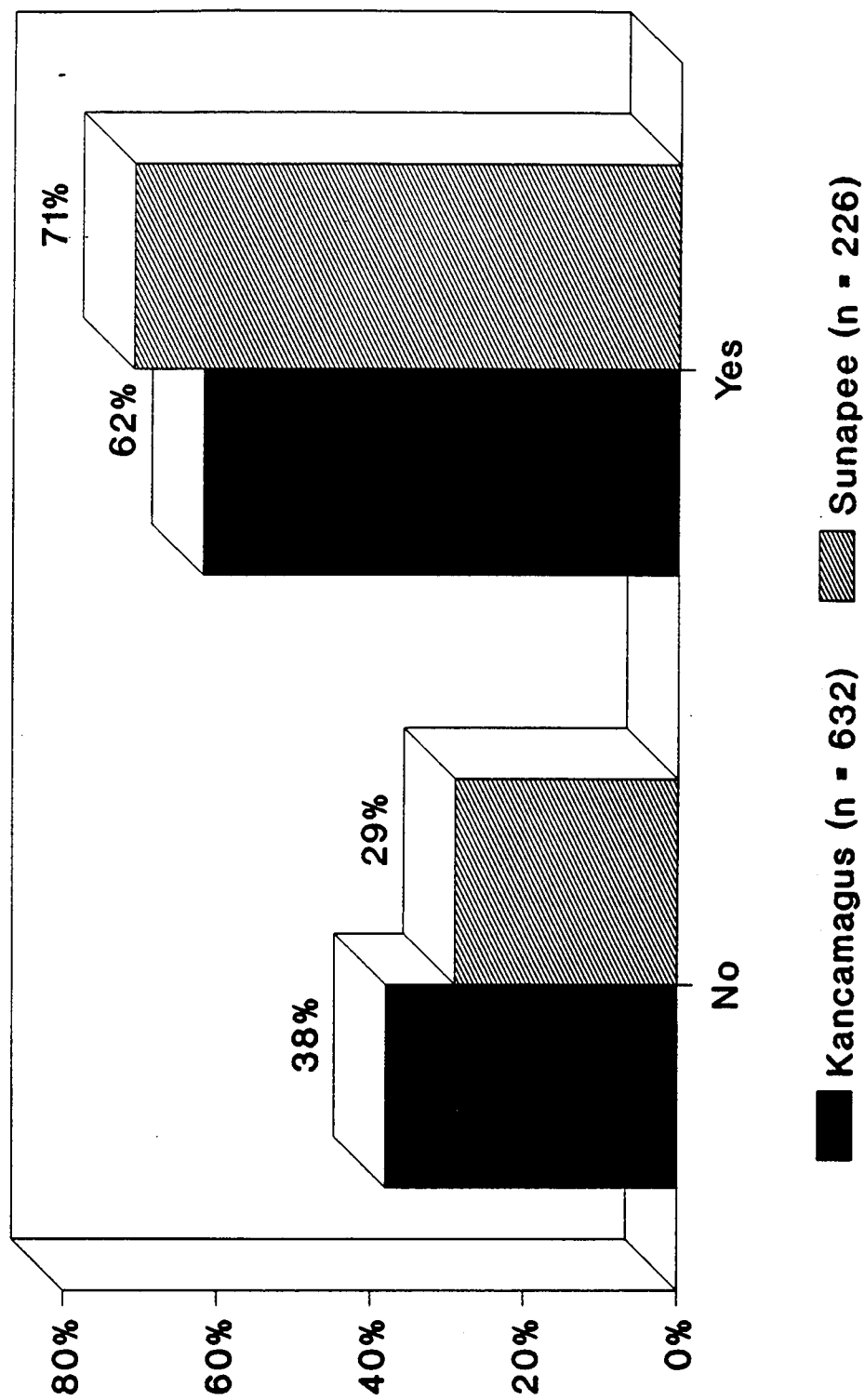
40% go to a single destination, or
60 tour different parts of the state

8. Do you have a *primary* destination on this trip?
- 40% no
60 yes
9. On this particular visit are you:
- 65% vacationing in the area
35 on a day trip
10. On this trip, which of the following activities are you planning to do in New Hampshire?
(CHECK ALL THAT APPLY)
- 66% Outdoor recreation (Hiking, Camping, etc.)
61 Visiting scenic areas
43 Driving for pleasure
39 Shopping
24 Visiting museums/historical sites
24 Visiting family and friends
14 Entertainment (Music or Theater)
10 Sports (Golfing, Tennis, etc.)
11 Personal or official business
7 Attending a cultural or sporting event
11. About how many nights do you plan to spend in the area? (CHECK ONE)
- 19% None
10 1 night
33 2 to 3
24 4 to 7
15 More than a week
- Average = 3.28 nights
12. If you are staying overnight on this trip to New Hampshire, where are you staying?
(CHECK ALL THAT APPLY)
- 18% I am not staying overnight
- 31% Campground
27 Hotel/Motel
15 with friends
11 Inn
6 Condominium
13. How many are in your travel party?
- Average
- 2.61 Number of adults
0.97 Number of children (Under 18)
3.58 Total Party Size
14. For each of the following items, about how much money will you spend *per day* (on average) on this trip?
- | Average (\$) | | Range (\$) |
|--------------|----------------|------------|
| \$45.27 | Lodging | 0 to 800 |
| 40.90 | Food | 0 to 600 |
| 12.93 | Transportation | 0 to 400 |
| 12.65 | Entrance Fees | 0 to 400 |
| 11.16 | Entertainment | 0 to 400 |
| 10.82 | Souvenirs | 0 to 200 |
| \$133.86 | Total | 0 to 1100 |

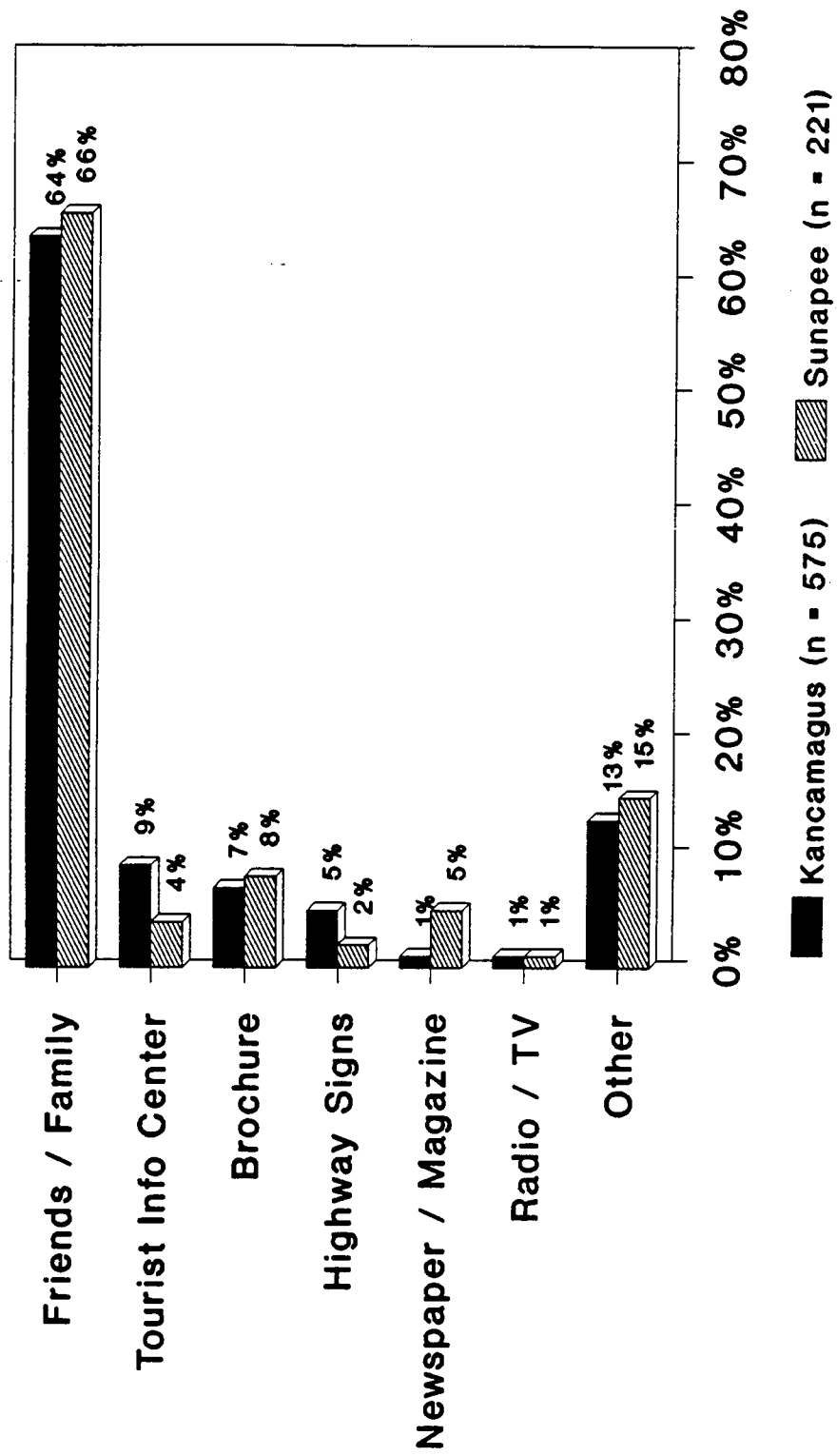
Have you ever travelled on the Kancamagus Highway/Lake Sunapee Region?



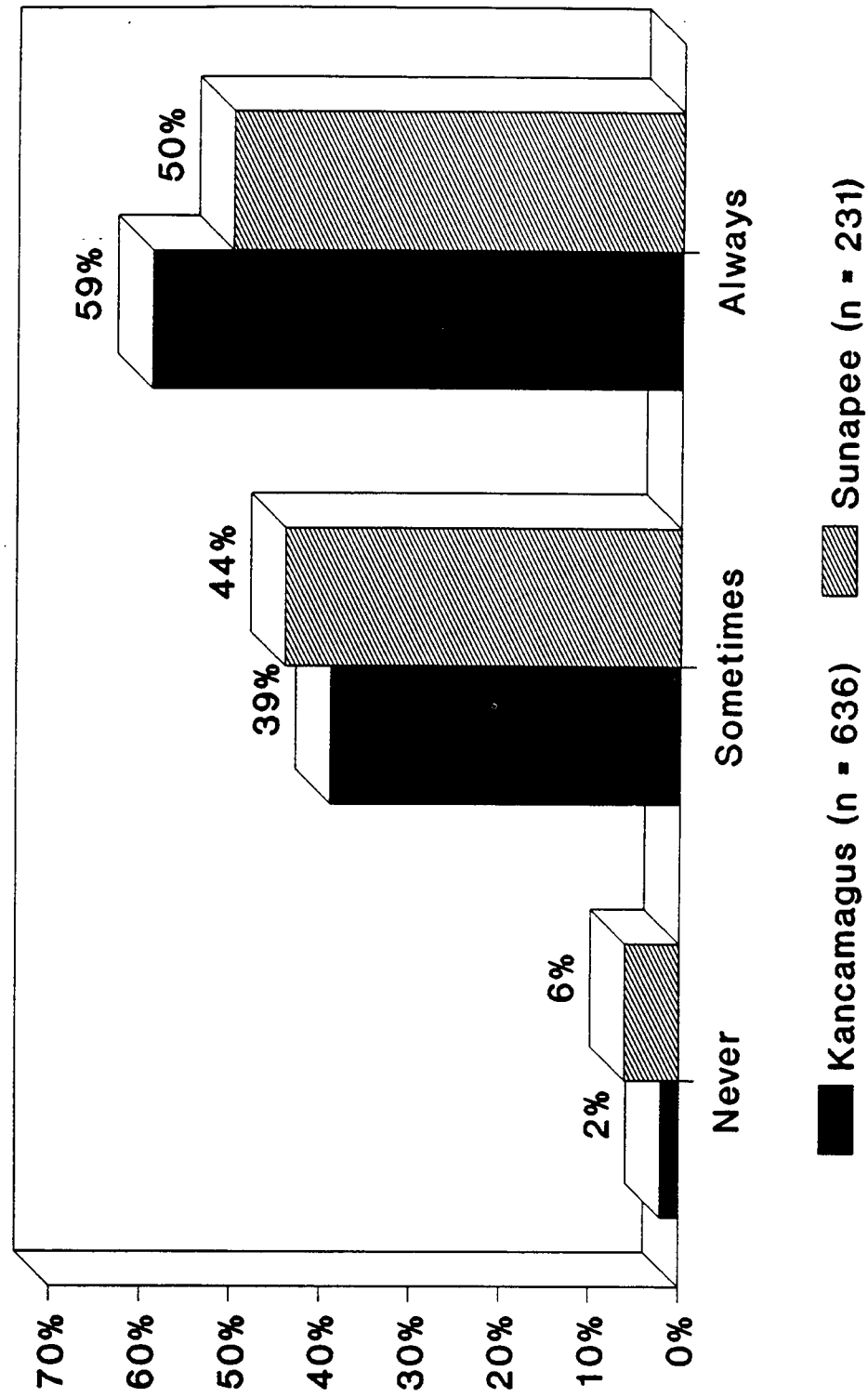
Prior to visiting New Hampshire had you heard about the Kancamagus/Lake Sunapee?



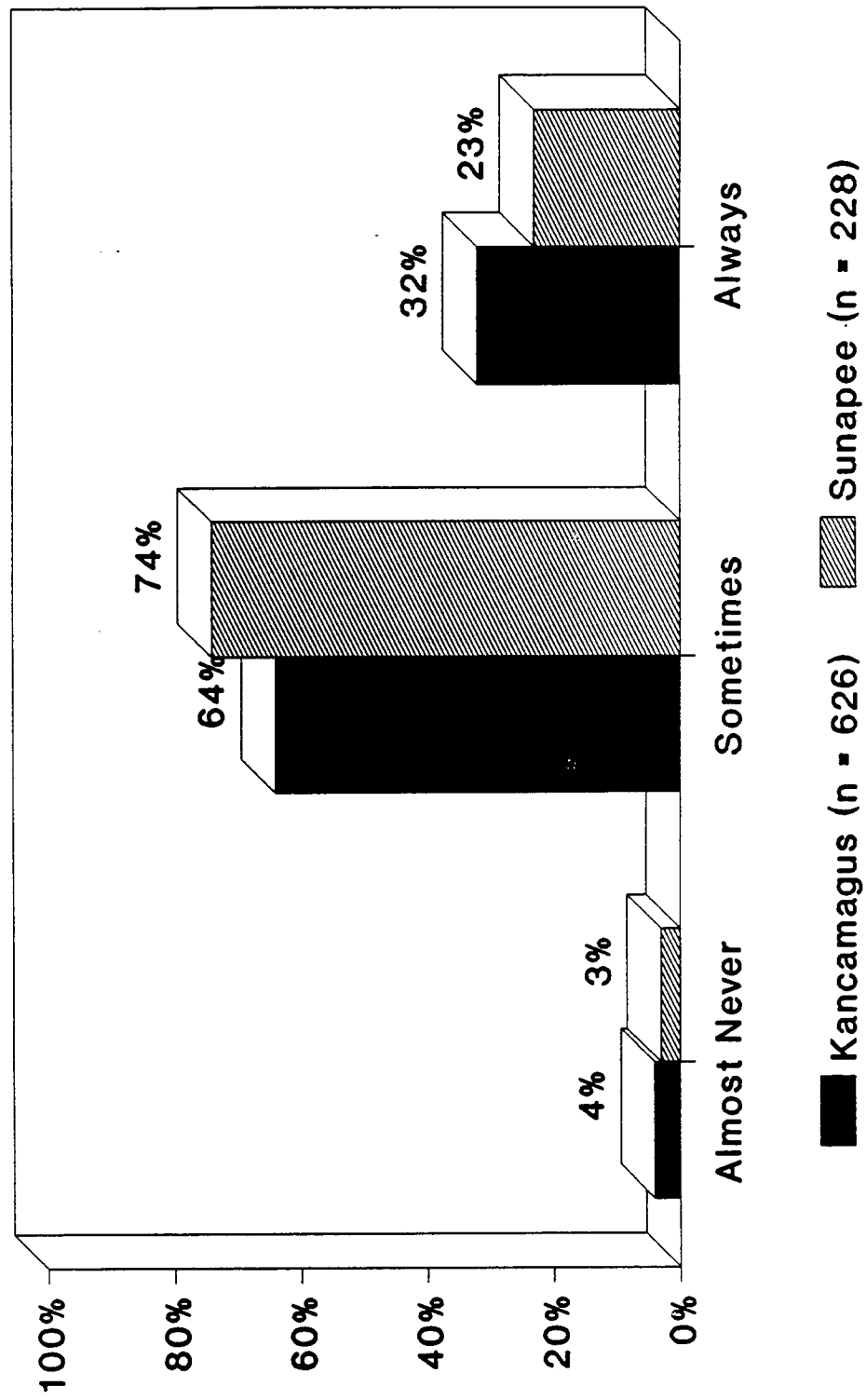
How did you first hear about the Kancamagus Highway/Lake Sunapee?



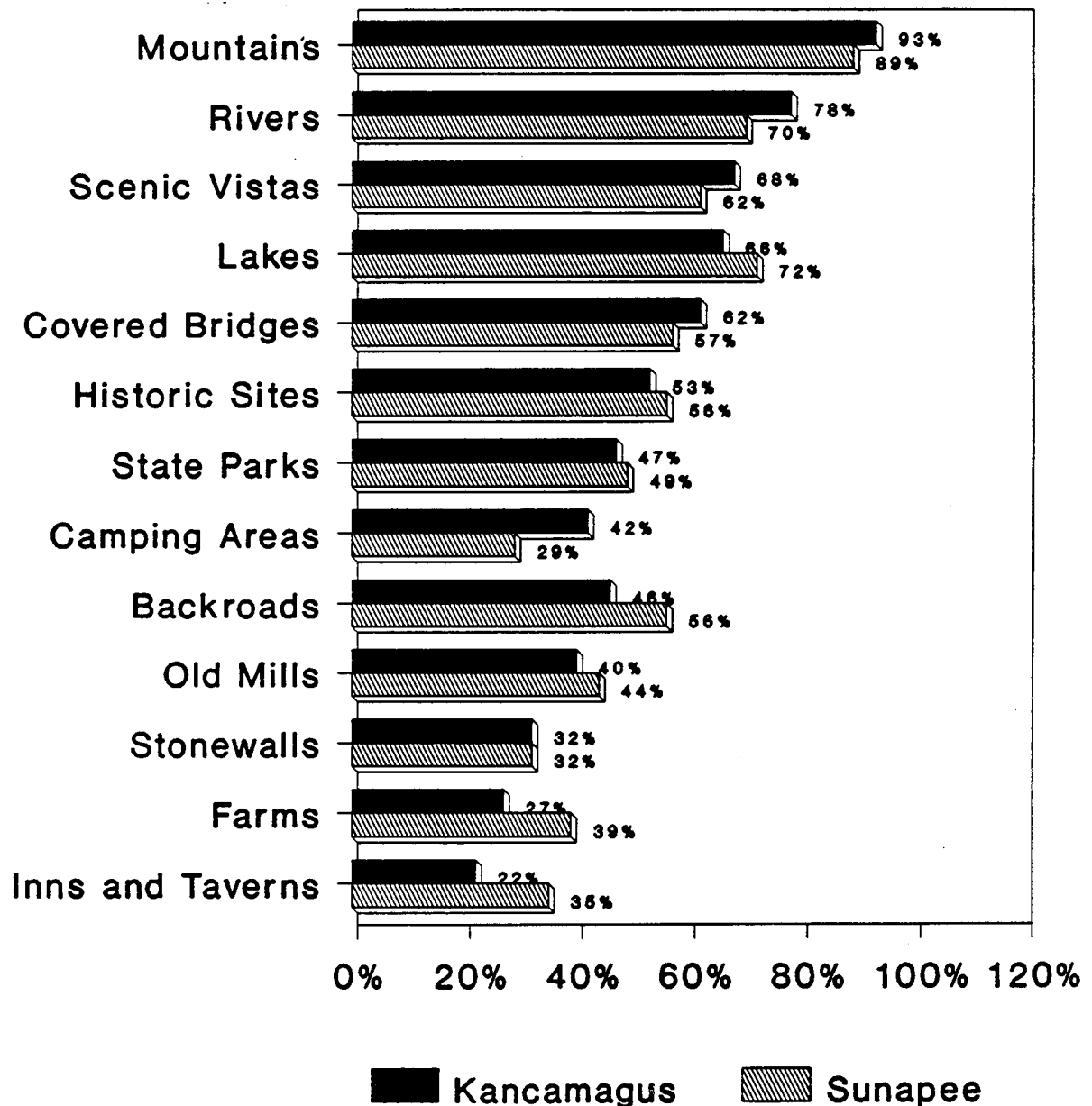
In planning vacations, to what extent do you look for scenic byways?



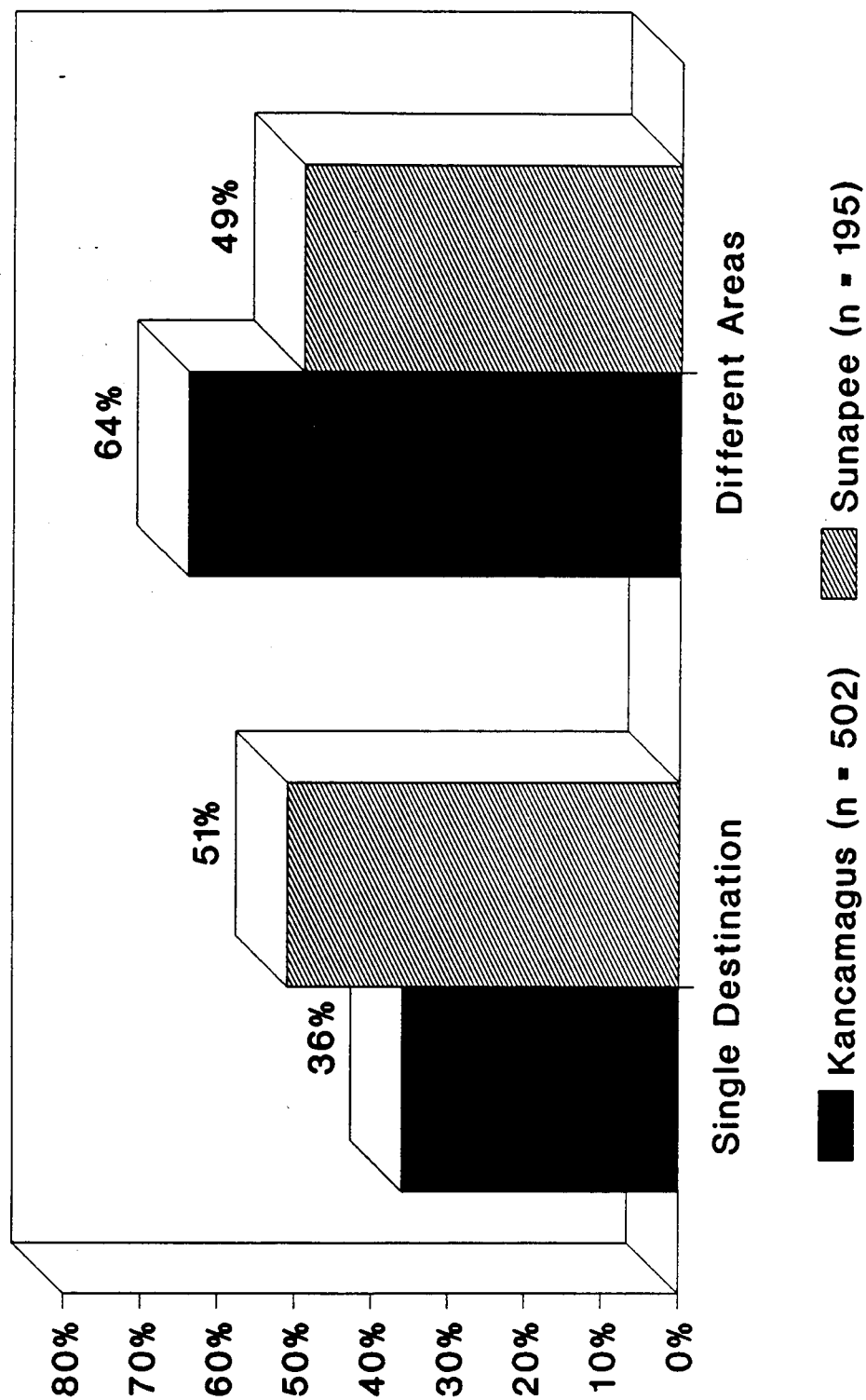
When in New Hampshire, to what extent do you travel on scenic byways?



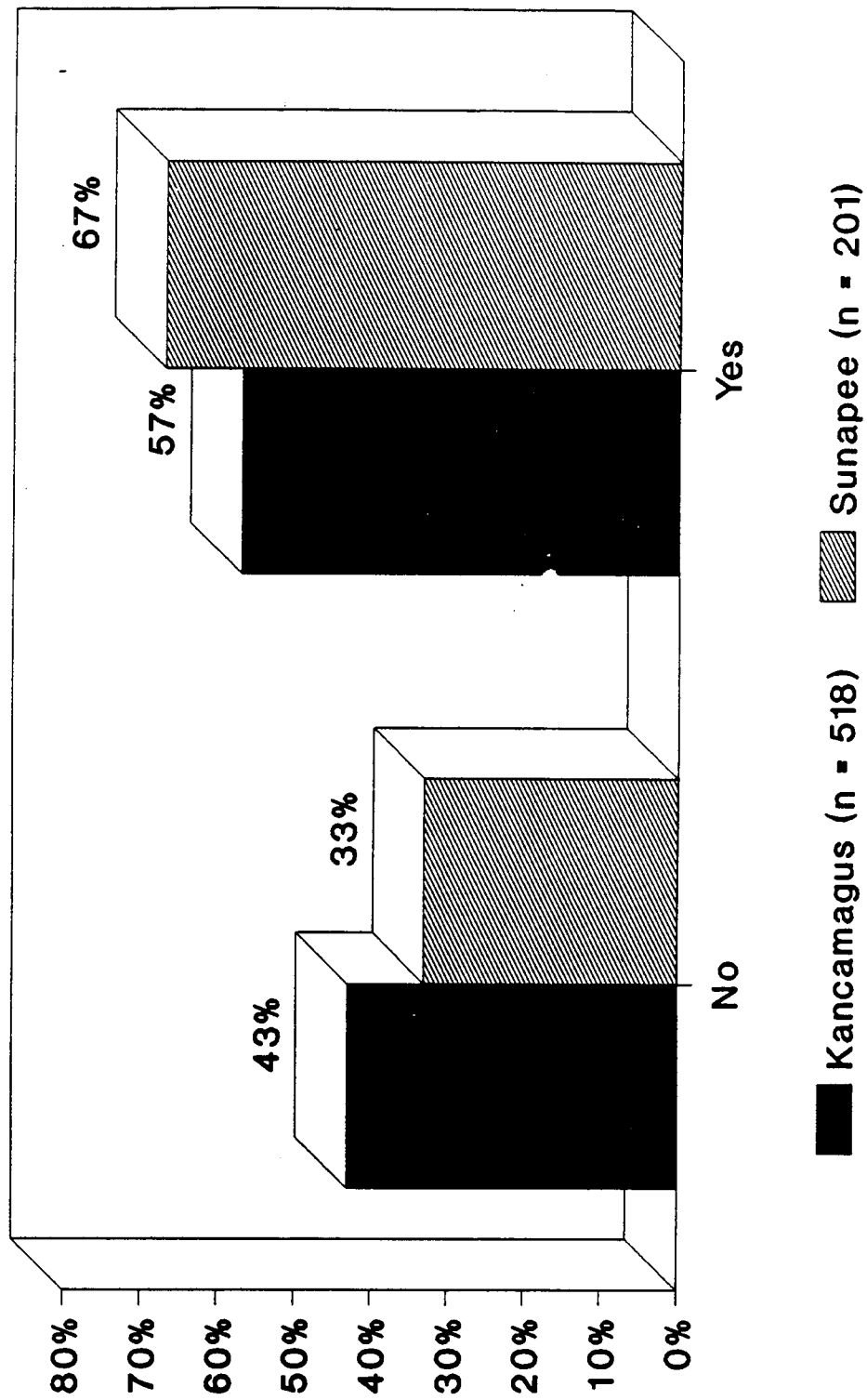
In the designation of a scenic byway which of the following are important?



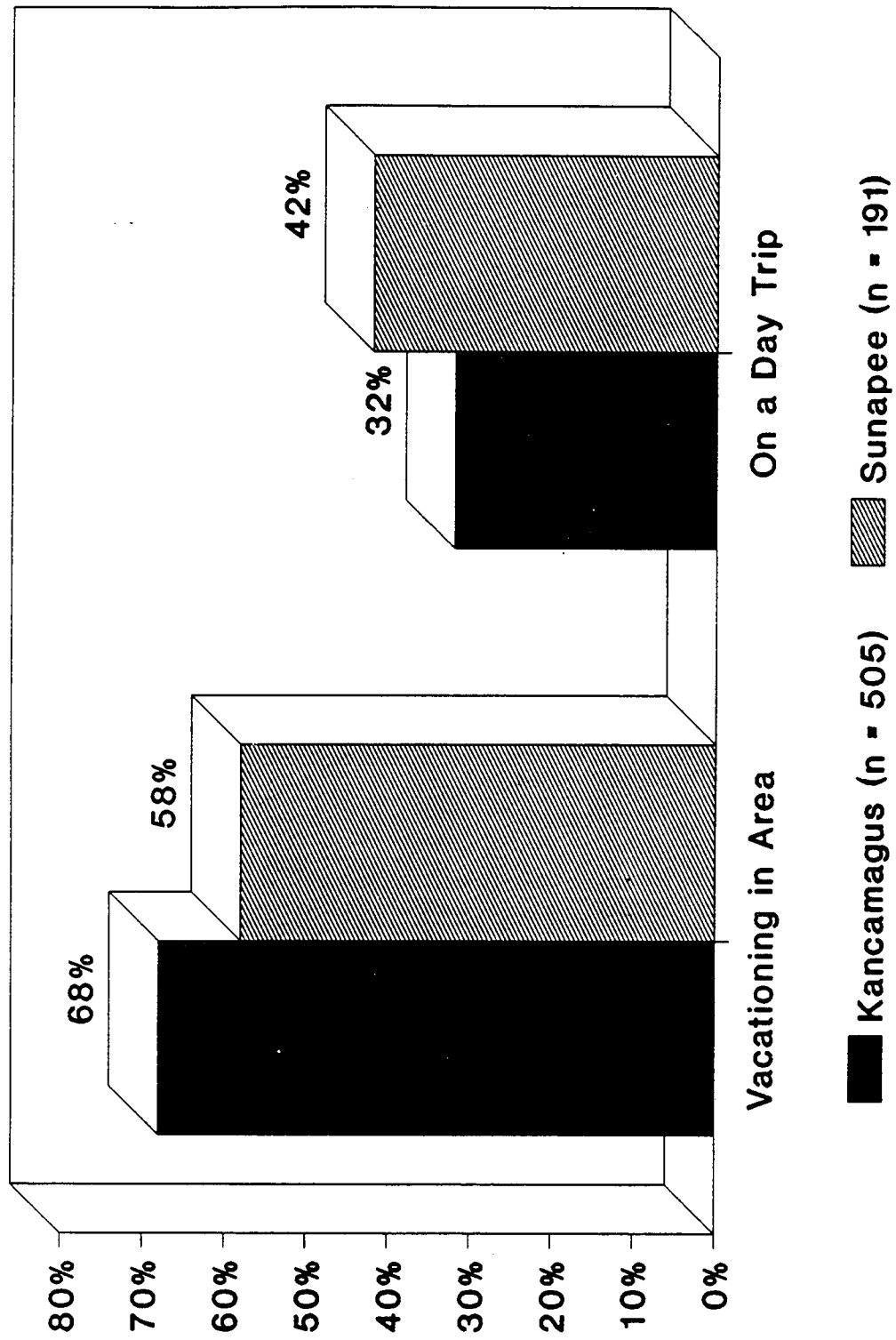
When visiting New Hampshire do you usually go to:



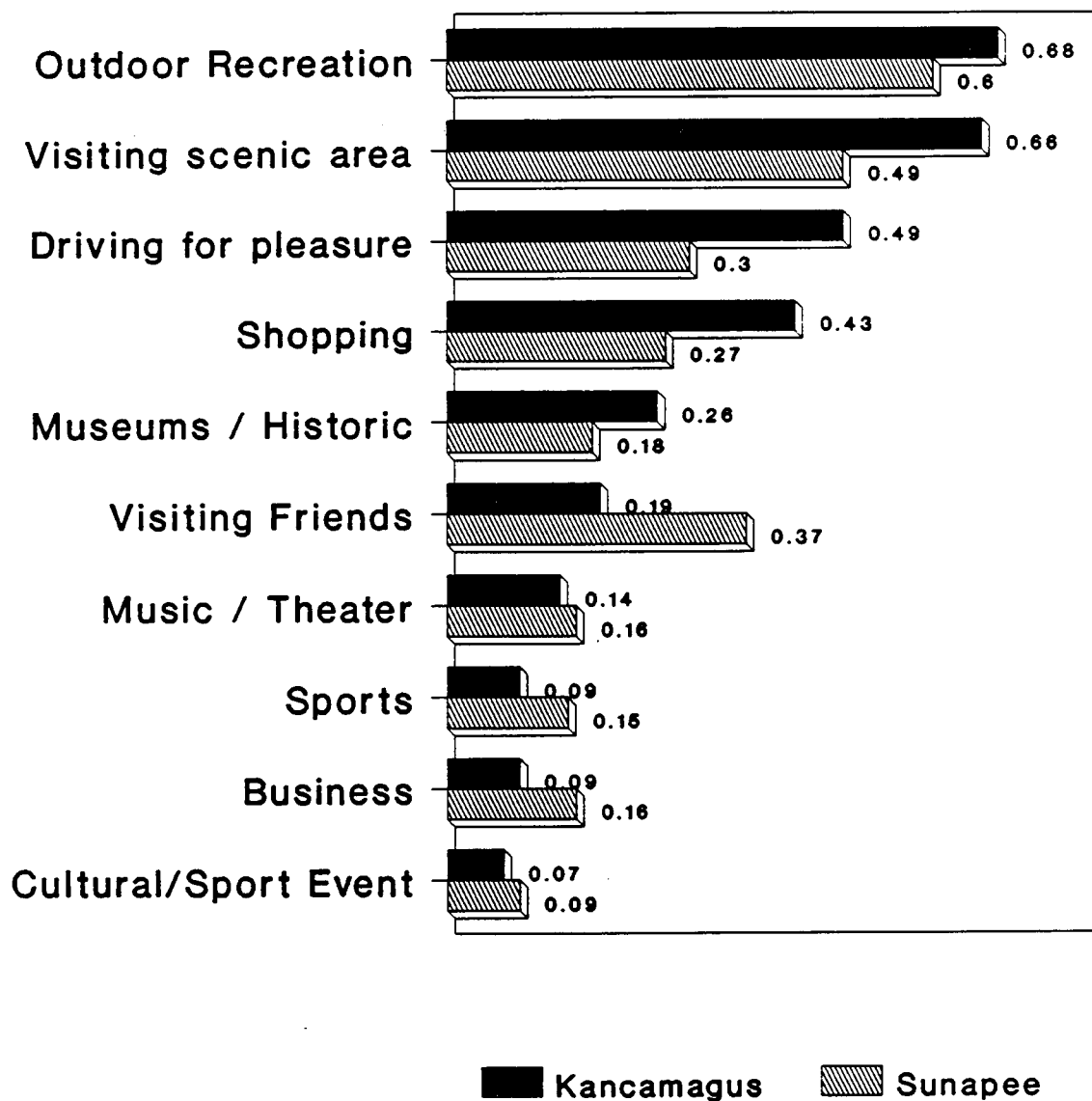
Do you have a primary destination on this trip?



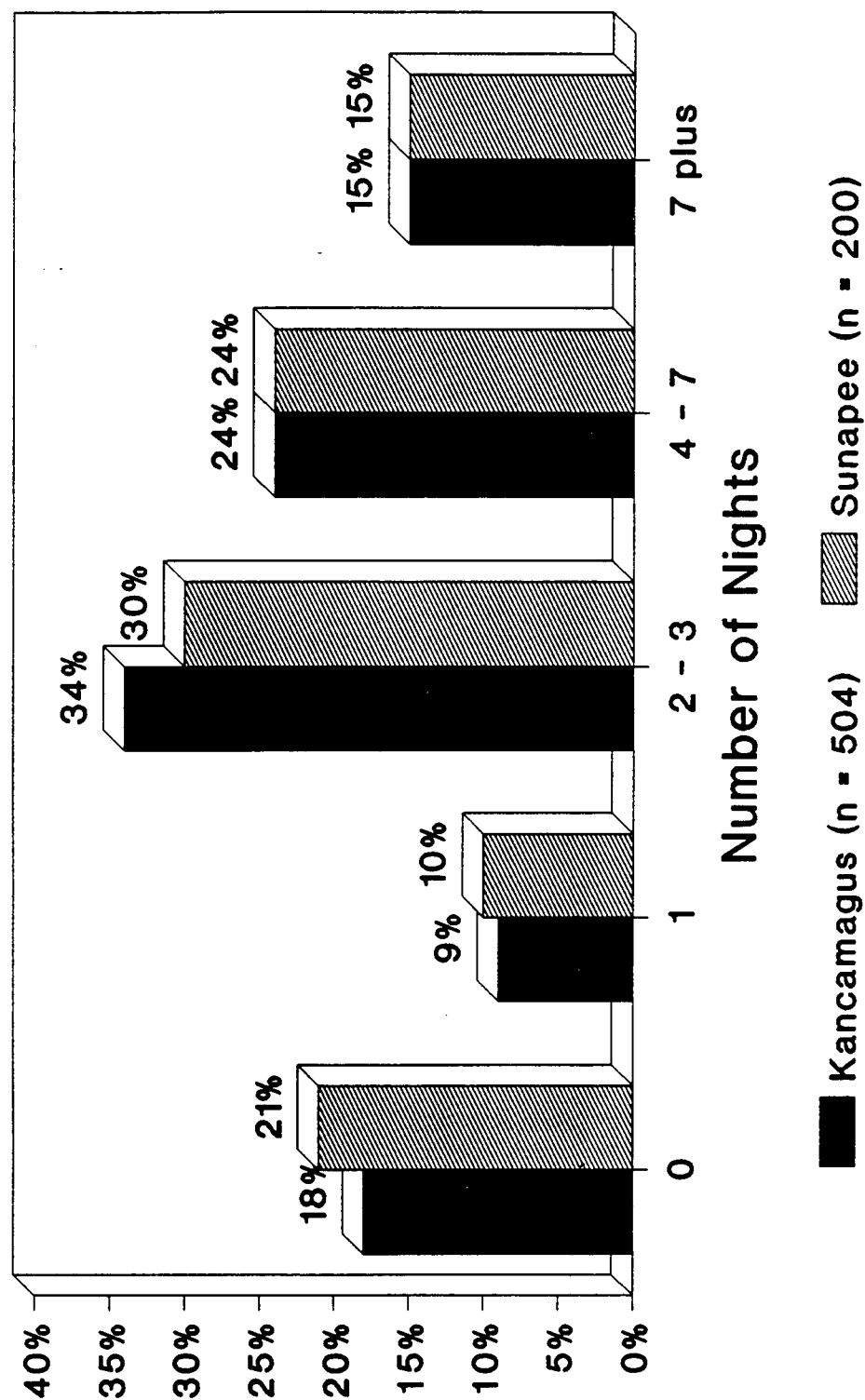
On this particular trip are you:



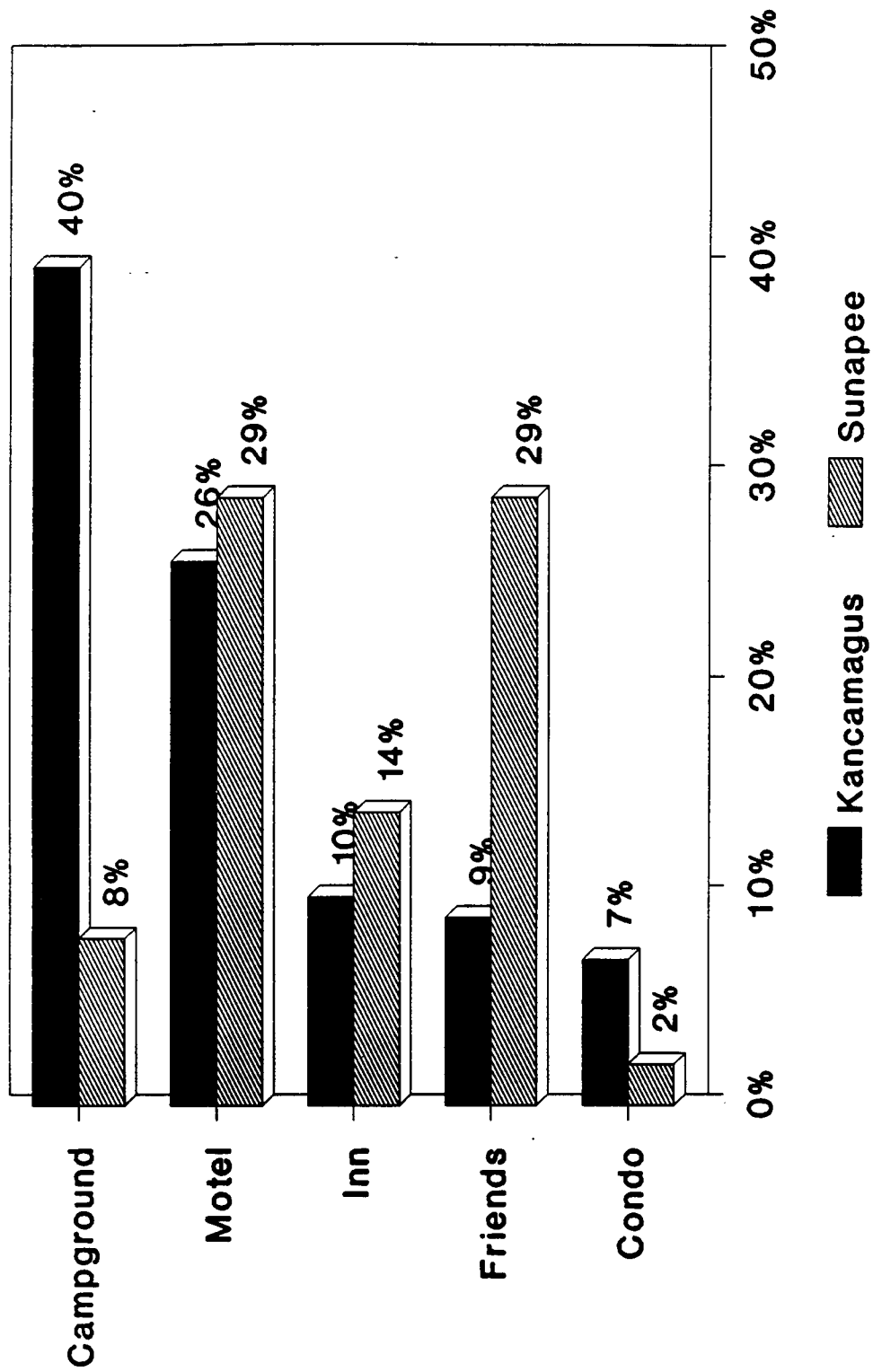
On this trip, which of the following activities are you planning to do in New Hampshire?



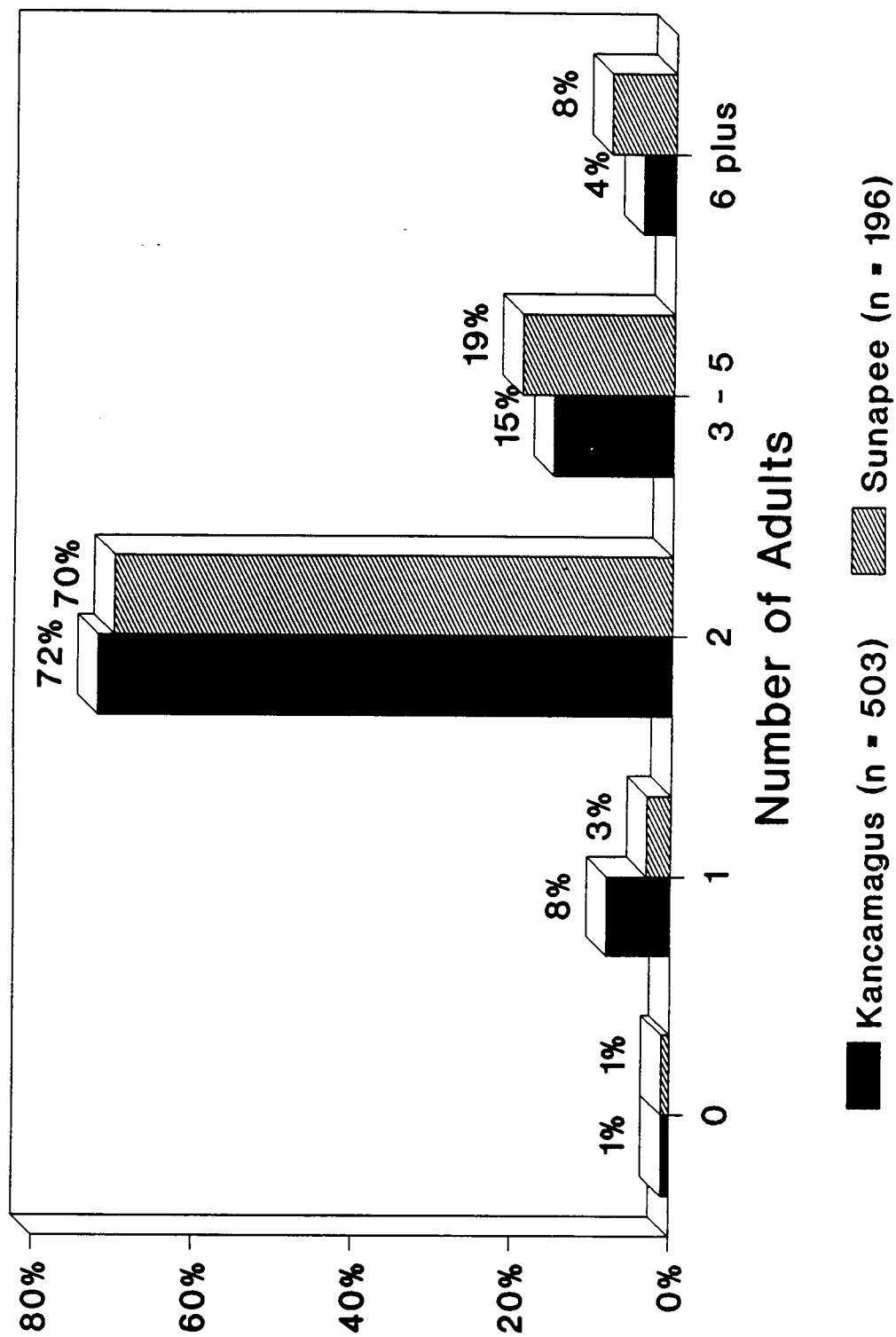
About how many nights do you plan to spend in the area?



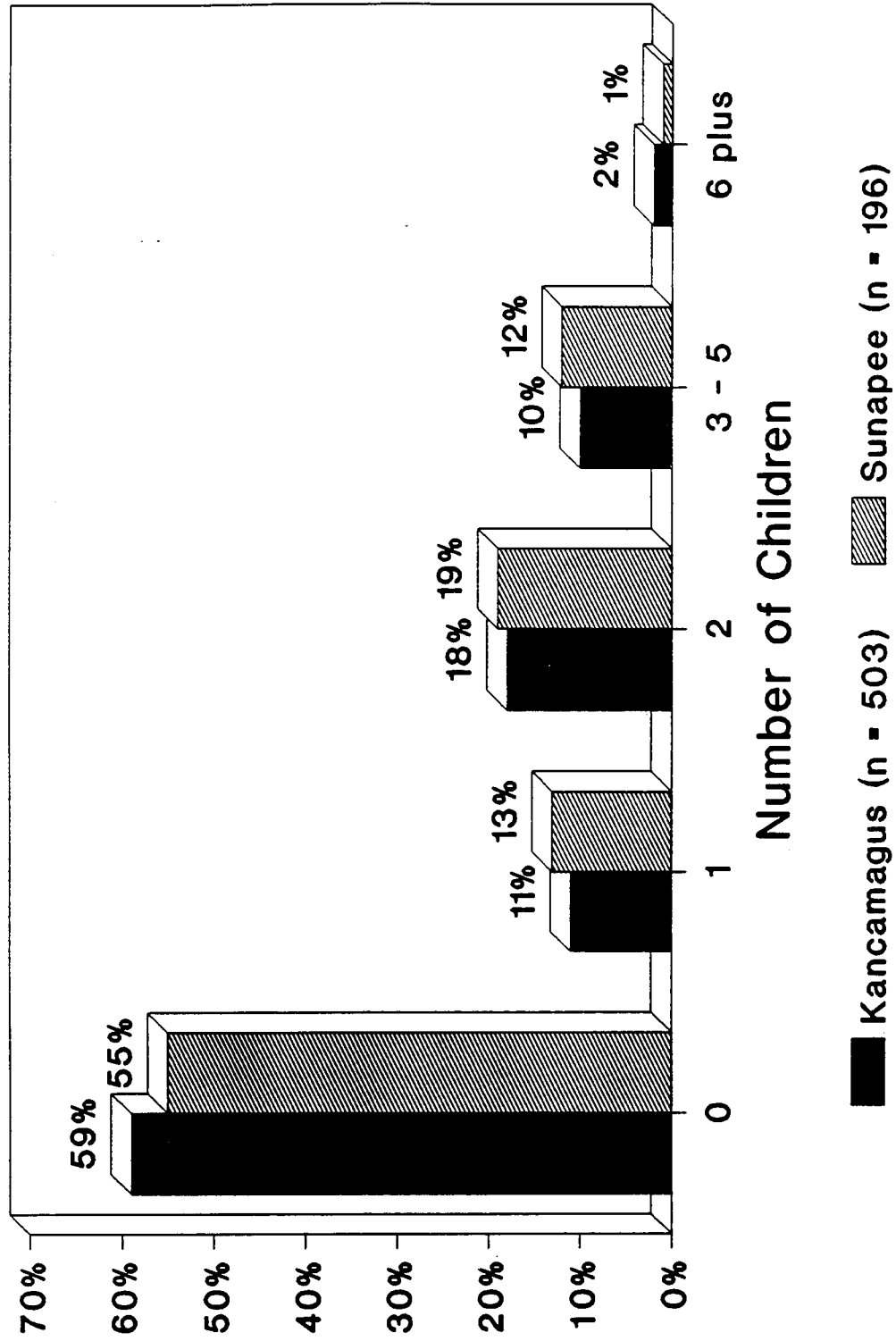
Where are you staying?



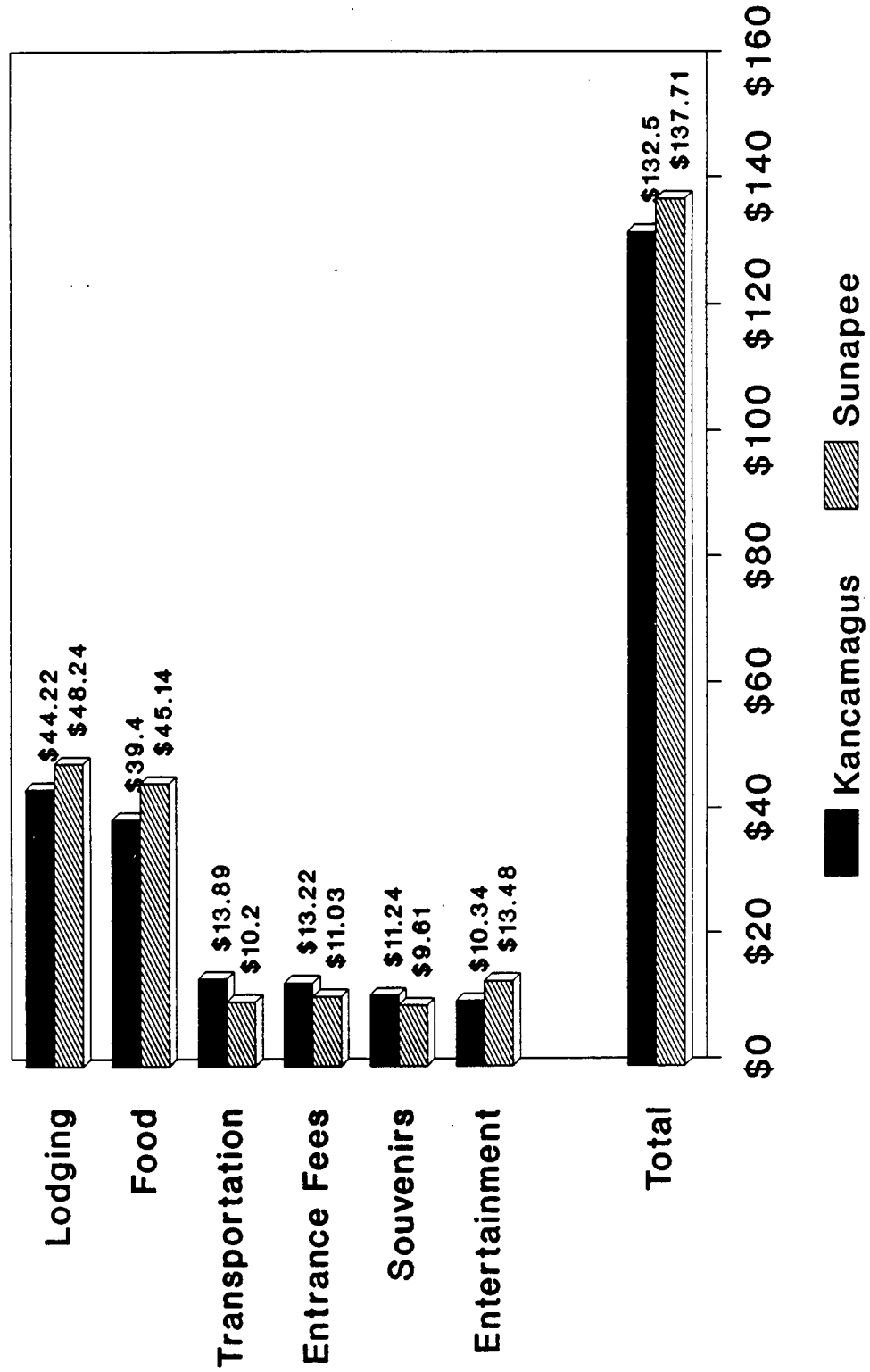
Number of Adults in Party



Number of Children in Party



Average Daily Expenditures



PART IV

BIBLIOGRAPHY AND REFERENCES

I. BIBLIOGRAPHY AND REFERENCES

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PART V

APPENDICES

APPENDIX A

TABLE 1

LAKE SUNAPEE AREA TRAFFIC COUNTS (1985-1989 increases in parentheses)

<u>Count Location</u>	<u>1985</u>	<u>1986</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>
Sunapee, NH 11 N. of NH 103B	4600	n/a	n/a	6300	6500 (+41%)
Sunapee, NH 11 1 mile S. of Georges Mills	n/a	n/a	n/a	4800	5900
Sunapee, NH 11 @ New London T/L	3400	n/a	4200	4700	5200 (+53%)
Sunapee, NH 103 @ Newbury T/L	3800	n/a	4400	3900	4100 (+8%)
Newbury, NH 103 S. of Andrews Br.	3153	2853	3567	4051	3935 (+25%)
Newbury, NH 103A @ New London T/L	n/a	n/a	n/a	1400	n/a

AVERAGE ANNUAL INCREASE

	Route 103 <u>Newbury</u>	<u>Statewide</u>
1984-1985	+19.3%	+9.6%
1985-1986	-9.6%	+11.1%
1986-1987	+25.0%	+7.6%
1987-1988	+13.5%	+6.2%
1988-1989	-2.9%	+1.2%

Source: New Hampshire Department of Transportation
Bureau of Transportation Planning
Traffic Research Section

TABLE 2

SEASONAL VARIATION IN TRAFFIC COUNTS
N.H. ROUTE 103, NEWBURY, NH

	<u>1988</u>		<u>1989</u>
Jan.	3,783	Jan.	3,406 *
Feb.	3,884	Feb.	3,563
Mar.	3,524	Mar.	3,434
Apr.	3,521	Apr.	3,486
May	4,053	May	3,943
June	4,333	June	4,266
July	4,988 **	July	5,030 **
Aug.	5,636 **	Aug.	5,369 **
Sept.	4,179	Sept.	4,053
Oct.	3,831	Oct.	3,805
Nov.	3,502 *	Nov.	3,346 *
Dec.	3,518 *	Dec.	3,463
Ann. Avg.	4,051	Ann. Avg.	3,935

** = Highest monthly average traffic volume

* = Lowest monthly average traffic volume

Source: New Hampshire Department of Transportation
 Bureau of Transportation Planning
 Traffic Research Section

TABLE 3

KANCAMAGUS HIGHWAY AREA TRAFFIC COUNTS
Average Annual Daily Trips
 (1985-1989 avg. annual increases in parentheses)

<u>Count Location</u>	<u>1985</u>	<u>1986</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>
Conway, NH 16 @ Albany T/L	8500	n/a	16000*	9000	9200 (+2%)
Albany, NH 112 @ Conway T/L	1389	1462	1467	2027	1871 (+8%)
Lincoln, NH 112 @ Kancamagus Hwy Entrance	1389	n/a	n/a	n/a	n/a
Lincoln, NH 112 E. of NH 3A @ Pollard Brook	n/a	n/a	n/a	3600	3700

*suspected error

AVERAGE ANNUAL INCREASE

	Kancamagus	
	<u>Highway</u>	<u>Statewide</u>
1984-1985	n/a	+9.6%
1985-1986	+5.3%	+11.1%
1986-1987	+0.3%	+7.6%
1987-1988	+37.9%	+6.2%
1988-1989	+1.2%	+1.2%

Source: New Hampshire Department of Transportation
 Bureau of Transportation Planning
 Traffic Research Section

TABLE 4

SEASONAL VARIATION IN TRAFFIC COUNTS
N.H. ROUTE 112, KANCAMAGUS HIGHWAY, ALBANY, NH

<u>1988</u>		<u>1989</u>	
Jan.	827	Jan.	835 *
Feb.	760 *	Feb.	1,040
Mar.	861	Mar.	865
Apr.	885	Apr.	940
May	1,538	May	1,513
June	2,060	June	1,897
July	4,034 **	July	4,058 **
Aug.	4,060 **	Aug.	3,935 **
Sept.	2,723	Sept.	2,782
Oct.	2,759	Oct.	3,000
Nov.	907	Nov.	840
Dec.	764 *	Dec.	702 *
Ann. Avg.	2,027	Ann. Avg.	1,871

** = Highest monthly average traffic volume

* = Lowest monthly average traffic volume

Source: New Hampshire Department of Transportation
Bureau of Transportation Planning
Traffic Research Section

TABLE 5

POPULATION: 1960, 1970 1980 and 1988 (est.)
LAKE SUNAPEE AREA

	<u>1960</u>	<u>1970</u>	<u>1980</u>	<u>1988(est.)</u>
Sunapee	1,164	1,384	2,312	2,782
Newbury	342	509	961	1,159
New London	1,738	2,236	2,935	2,955
Sullivan Co.	28,067	30,949	36,063	37,954
Merrimack Co.	67,785	80,925	98,302	118,499
New Hampshire	606,921	737,681	920,610	1,085,000

*Data for 1988 is NHOSP estimate.

Source: U.S. Census of Population, 1970 and 1980
N.H. Office of State Planning, "1988 Population Estimates
of New Hampshire Cities and Towns", August 1989.

TABLE 6

LAKE SUNAPEE AREA
POPULATION CHANGE: 1960-70, 1970-80, and 1980-88

	<u>1960-70</u>	<u>1970-80</u>	<u>1980-88</u>
Sunapee	+ 18.9%	+ 67.0%	+ 20.3%
Newbury	+ 48.8%	+ 88.8%	+ 20.6%
New London	+ 28.6%	+ 31.3%	+ 0.7%
Sullivan Co.	+ 10.3%	+ 16.5%	+ 5.2%
Merrimack Co.	+ 19.4%	+ 21.5%	+ 20.5%
New Hampshire	+ 21.5%	+ 24.8%	+ 17.9%

Source: U.S. Census of Population, 1970 and 1980

N.H. Office of State Planning, "1988 Population Estimates of New Hampshire Cities and Towns", August 1989.

TABLE 7

POPULATION: 1960, 1970 1980 and 1988 (est.)
KANCAMAGUS HIGHWAY AREA

	<u>1960</u>	<u>1970</u>	<u>1980</u>	<u>1988(est.)*</u>
Conway	4,298	4,865	7,158	9,121
Lincoln	1,228	1,341	1,313	1,443
Carroll Co.	15,829	18,548	27,931	34,446
Grafton Co.	48,857	54,914	65,806	74,453
New Hampshire	606,921	737,681	920,610	1,085,000

*Data for 1988 is NHOSP estimate.

Source: U.S. Census of Population, 1970 and 1980
 N.H. Office of State Planning, "1988 Population Estimates
 of New Hampshire Cities and Towns", August 1989.

TABLE 8

KANCAMAGUS HIGHWAY AREA
POPULATION CHANGE: 1960-70, 1970-80, and 1980-88

	<u>1960-70</u>	<u>1970-80</u>	<u>1980-88</u>
Conway	+ 13.2%	+ 47.1%	+ 27.4%
Lincoln	+ 9.2%	- 2.1%	+ 9.9%
Carroll Co.	+ 17.2%	+ 50.6%	+ 23.3%
Grafton Co.	+ 12.4%	+ 19.8%	+ 13.1%
New Hampshire	+ 21.5%	+ 24.8%	+ 17.9%

Source: U.S. Census of Population, 1970 and 1980

N.H. Office of State Planning, "1988 Population Estimates of New Hampshire Cities and Towns", August 1989.

APPENDIX B

MEETING PARTICIPANTS

N.H. Scenic Byways Workshop
July 18, 1990

David Scott	N.H. Office of State Planning 2 1/2 Beacon Street, Concord, NH 03301 271-2155
Harry Kinter	Federal Highway Administration 55 Pleasant Street, Concord, NH 03301 225-1605
Fred Murpny	N.H. Department of Transportation Hazen Drive, Concord, NH 03301 271-3731
Mildred Beach	Former Dir. of Lakes Region Association Box 206, Wolfeboro, NH 03894 569-2631
Gretchen Ziegler	Pres. elect of Tourism Council (also Timber & Tourism and Campgrounds) RFD 1, Box 750, Hancock, NH 03449 525-3568
Beth Ruesch	N.H. Hospitality Assn. 46 Pleasant Street, Concord, NH 03301 228-9585
Chris Jennings	N.H. Office of Vacation Travel 105 Loudon Road, Concord, NH 03301 271-2666
Mike Duprey	White Mountains Attractions Assn. Box 176, North Woodstock, NH 03262 745-8720
Phil Fullerton	Lake Sunapee Region/Mountain Lake Inn P.O. Box 443, Bradford, NH 03221 938-2136
Cynthia Dunagan	Southern N.H. Convention and Visitors Bureau 1500 Constitution Drive, Suite 101 Bedford, NH 03102 472-9747
Carol Barleon	Commission on the 21st Century 2 1/2 Beacon Street

Concord, NH 03301

woody Keeney

Office of the Governor
State House
Concord, NH 03301

Sharon Francis

Connecticut River Valley Resource Comm.
P.O. Box 1182, Charlestown, NH 03603
826-4800

Sarah Hughes

Scenic Byways Consultant
6 Keane Avenue, Concord, NH 03301
225-8492

* * * *

OTHER CONTACTS

Steve Barba	The Balsams (also Timber & Tourism) Dixville Notch, NH 255-3400
Mary Rulison	Seacoast Council on Tourism 1000 Market Street, Portsmouth, NH 03801 436-7678
Dave Lee	Lakes Region Association P.O. Box 300, Wolfeboro, NH 03894 569-1117
John Schott	Timber & Tourism Consultant 218 Mountain Road, Jaffrey Ctr., NH 03454 532-7660
Stuart Wallace	N.H. Division of Historic Resources 15 S. Fruit Street, Concord, NH 03301 271-3483
Ron Brown	NH Campground Owners Assn. P.O. Box 320, Twin Mt., NH 03595 846-5511
Paul Bofinger	Society of the Protection of NH Forests 54 Portsmouth Street, Concord, NH 03301 224-9945
Rob McCarthy	Clarion Somerset Hotel Nashua, NH 886-1200
Shirley Adamovich	N.H. Commission of Arts, Libraries and Historic Resources 15 S. Fruit St, Concord, NH 03301 271-3483
Judy Northrup-Bennett	League of NH Craftsmen 205 North Main Street, Concord, NH 03301 224-3375
John Page	Inherit New Hampshire 118 North Main Street, Concord, NH 03301 224-2281
Bruce Bender Shelley Hatfield	Upper Valley Lake Sunapee Council RR 1, Box 123, Lebanon, NH 02766 448-1680

Jerry Vaske

UNH Dept. of Leisure Mgmt. and Tourism
202 Hewitt Hall, Durham, NH 03824
862-2391

Maura Gorman

The Road Less Travelled
(Travel itinerary planning services)
Seamans Road, New London, NH 03257
526-4353

* * *

SURVEY BOX "HOSTS"

Ms. Carol Adams-Pontier (Exec. Director)	I-93 White Mountains Gateway Chamber of Commerce RFD 1, Box 1067 Campton, NH 03223 726-3804
Arthur Dennison, Manager	State of New Hampshire Rest Area Intervale Scenic Overlook Route 16/302 Intervale, NH 03845 356-3961
David Pratt	District Ranger/Recreation Director White Mountains National Forest Saco Ranger Station Kancamagus Highway Conway, NH 03818 447-5448
Richard Hamilton Director	White Mountains Attractions P.O. Box 176 North Woodstock, NH 03232 745-8720
Macy Doherty Donald and Nancy Bent	New London Chamber of Commerce Information Center Main Street New London, NH 03257 526-6575
Ann Therrien	Hospitality Motel P.O. Box 390 Newbury, NH 03255 763-2701
Mike Durfor	Dexter's Inn and Tennis Club Stagecoach Road Sunapee, NH 03782 763-5571
Theresa Hamilton	Town of Sunapee Information Booth N.H. Route 11/103B Sunapee, NH 03782 763-5456
Ross Hunt	Mt. Sunapee State Park Route 103 Newbury, NH 03255 763-2356

Capt. David Hargbol

M/V Mt. Sunapee II
Sunapee Harbor
Sunapee, NH 03782
763-4030

* * *

APPENDIX C

EXISTING AND POTENTIAL SCENIC ROADS IN NEW LONDON

Existing Scenic Roads

Camp Sunapee Road
County Road
Pingree Road
Soonip1 Park Road
Davis Hill Road

Potential Scenic Roads

Old Country Road (Bucklin House to Morgan Hill Road)
Old Main Street
Tracy Road
Otterville Road
Goose Hole Road
Lake Shore Drive
Bunker Road
Burpee Hill Road
Bog Road
County Road (Tracy Road to Route 103A)
Columbus Avenue

HISTORIC LANDSCAPE/ARCHITECTURAL AREAS

Main Street - Crockett's Corner to Homan's Corner

Old Main Street/Knight's Hill & Burpee Hill

Otterville

Morgan Hill

Little Lake Sunapee

Pleasant Lake

Elkins

Low Plain Area

Crockett's Corner/ Hominy Pot to King Hill

Tracy Road Area

West Part of Town, Lake Sunapee

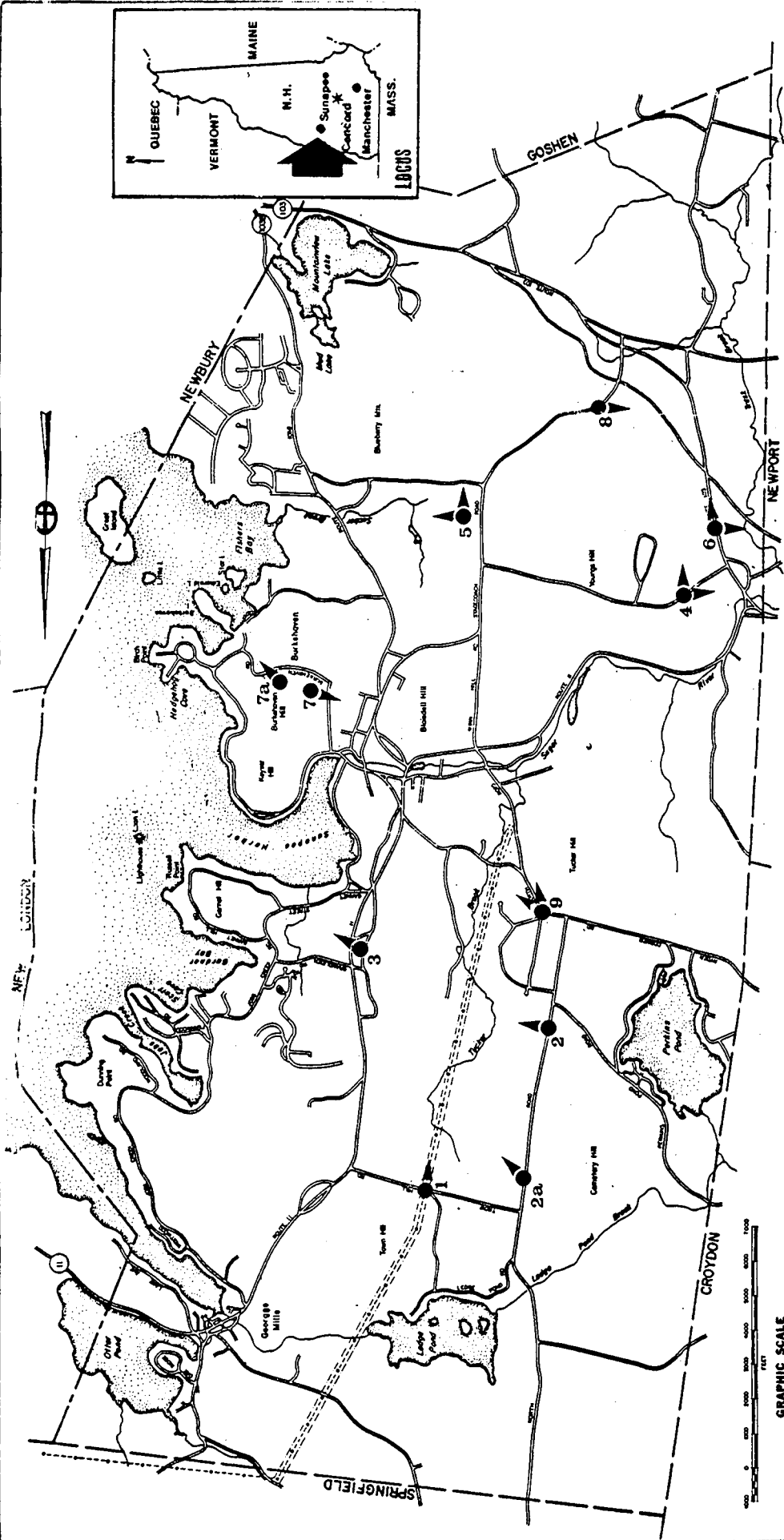
OPEN SPACE AND CONSERVATION AREAS IN NEW LONDON

Clark Lookout	View of Lake Sunapee and Mt. Sunapee from Herrick Cove
Clark Pond	Undeveloped shores
Glacial Pot Hole	In granite ledge near Pleasant Lake
Knight's Hill Nature Park	69 acre preserve with well developed trail system, staff naturalist in summer
Lake Sunapee	Connecticut River/Merrimack River watershed divide
Little Sunapee Lake	
Lyon Brook Area	
Low Plains Nature Area	Beaver pond, marsh, quaking bog, ponds and pools
Messer Pond	82 acres, floating bog, tamaracks, blueberries, cranberries
Morgan Pastures	New London Conservation Commission hiking trails, scenic overlook with views of Pleasant Lake and New London Village
Otter Pond	180 acres, warm water fishing
Phillips Memorial Preserve	View of Lake Sunapee and Mt. Sunapee
Philbrick-Cricenti Bog	Owned by Town, lake-to-forest succession Newport Road
Pleasant Lake	606 acres, loons, salmon, trout, bass fishing

APPENDIX D

SCENIC VISTAS IN THE TOWN OF SUNAPEE

	<u>Location</u>	<u>Direction</u>	<u>View</u>
1.	Trow Hill Road	South	Mt. Sunapee and Sunapee Valley
2.	North Road	East	Kearsarge Mountain Sunapee Village
3.	Seven Hearths Road	South/ West	Overlooks Lake Sunapee
4.	Young's Hill Road	South/ West	John Paul Flats Distant hills and mountains
5.	Dexter's Inn Road	South/ East	Lake Sunapee and Mt. Sunapee
6.	John Paul Flat	West/ South	Surrounding valley and hills
7.	Burkehaven Hill	Northwest Southeast	Sunapee Village Lake Sunapee and Mt. Sunapee
8.	Top of Harding Hill	West	Mt. Ascutney
9.	Tucker Hill (North Road)	South/ Southeast	Sunapee Village



SCENIC VISTAS

MAP IX-1
TOWN OF SUNAPEE
NEW HAMPSHIRE

APPENDIX E

State of North Carolina Scenic Byway Criteria and Guidelines

1. The route under consideration must have significant visible natural or cultural features along its borders. These include agricultural lands, historic sites, vistas of marshes, shorelines, forests with mature trees or other areas of significant vegetation, or notable geologic or other natural features. Singly or in combination these features set this route apart from others as being distinct.
2. The proposed Scenic Byway shall have a minimum length of one (1) mile.
3. Development along the proposed Scenic Byway shall not detract from the scenic natural character and visual quality of the route's area..
4. Preference will be given to those corridors with land use controls to reasonably protect the aesthetic or cultural value of the Scenic Byway.
5. De-designation: A route may be de-designated if its character has changed such that it no longer meets the criteria under which it was designated.

State of Colorado
Scenic and Historic Byways Commission
Criteria for Scenic Byway Designation

1. The proposed Scenic and Historic Byway must possess unusual, exceptional, and/or distinctive scenic, recreational, historic, education, scientific, geological, natural, wildlife, cultural or ethnic features.
2. The proposed Scenic and Historic Byway must be suitable for the prescribed type(s) of vehicle use.
3. The proposed Scenic and Historic Byway must be an existing route and have public access.
4. The proposed Scenic and Historic Byway must have strong local support and proponents must demonstrate coordination with relevant agencies.
5. The proposed Scenic and Historic Byway must be accompanied by a conceptual plan, as specified in the nomination process.

APPENDIX F

S Scenic Vista
H Historic Site
NR Natural Resource Area
AC Visual Arts, Handcrafts
PA Performing Arts
R Recreation

Lake Sunapee Area Scenic/Historical/Cultural Resources to be Considered for Scenic Byway Route Designation:

- S Existing and Potential Scenic Roads in the Town of New London
(See Appendix C)
- H/S Historic Landscape/Architectural Areas in New London (See Appendix C)
- S/NR Open Space and Conservation Areas in New London
(See Appendix C)
- S Scenic Vistas in the Town of Sunapee (See Appendix D)
- R/S Mt. Sunapee State Park, Route 103, Newbury
Hiking trails, triple chair to summit
- R Mt. Sunapee State Park Beach, Route 103, Newbury
- S/H M/V Mt. Sunapee II, Sunapee Harbor, Capt. David Hargbol,
763-4030. Two narrated tours of Lake Sunapee daily, charter
cruises, fall foliage cruises
- H New London Historical Society, Little Sunapee Road, 526-6715
Museum open by appointment
- H Sunapee Historical Society Museum, Sunapee Harbor, 763-9723
- H Center Meeting House, N.H. Route 102/103A, Newbury
- AC Marion G. Mugar Art Gallery, Colby-Sawyer College, New London,
526-2010
- AC Burpee Homestead Barn Gallery, East Main Street, New London,
526-6523
- AC Deming Art Gallery, Main Street, New London, 526-2320
- PA New London Barn Playhouse, Main Street, New London, 526-6710
Summer stock theatre for adults and children

PA Sawyer Center Theatre, Colby-Sawyer College, 526-2010

PA Music at King Ridge, King Ridge Ski Area, New London, 526-6575

PA Concerts in New London, Mary D. Haddad Memorial Bandstand, New London, 526-6575

PA Springfield COMMunity Band Concerts - Sunapee Harbor and Georges Mills, throughout the summer.

NR Knights Hill Nature Park, County Road, New London, 60 acre nature preserve, twice weekly programs for adults and children, hiking trails

NR Cricenti's Bog, New London, nature preserve and hiking trails

S M/V Kearsarge - Dinner cruises on Lake Sunapee, Sunapee Harbor, Captain Stephen McGrath, 763-0378

AC Handcrafts - Artisan's Workshop, Main Street, New London, 526-4227

Commercial Sporting Outlets:

- R Bicycle Rentals - Kiernan's Good Sports, New London Shopping Center and Sunapee harbor, 526-4948
- R Skindiving Lessons- Laporte's Skindiving Shop, Route 103, Newbury, 763-5353
- R Boat Rentals - Sargents Marina, Georges Mills, 763-5032
- R Tennis Courts -
 - Colby-Sawyer College, New London, 526-2010
 - Dexter's Inn and Tennis Club, Sunapee, 763-5571
 - White Birch Racquet Club, King Ridge Road, New London, 526-9293
 - Lake Sunapee Country Club, 526-6040
- R Windsurfer Rentals and Lessons - Mt. Sunapee State Park Beach, 763-2356
- R Golf Courses - 18 Holes
 - Lake Sunapee Country Club, New London, 526-6040
- R Golf Courses - 9 Holes
 - Granliden, Sunapee,
 - Twin Lake Villa, New London, 526-6460
- R Lake Sunapee Yacht Club
- R Skiing - Alpine
 - Mt. Sunapee Ski Area, Mt. Sunapee State Park, 763-4020
 - King Ridge Ski Area, King Ridge Road, New London, 526-6966
- R Skiing - Nordic
 - Norsk Ski Touring Center, New London
- R Beaches - Mt. Sunapee State Park Beach, Newbury
Otter Pond Beach, Georges Mills
- R Fishing - Lake Sunapee: Salmon, Lake Trout, Bass
Otter Pond: Bass
- R Boat Launches
 - Sunapee Harbor, Blodgett's Landing, Mt. Sunapee State Park, Georges Mills

NEW HAMPSHIRE SCENIC BYWAYS SURVEY

The New Hampshire Department of Transportation and the Office of State Planning are conducting this survey to learn more about those features that affect your trips to New Hampshire. It will be an important component of a scenic byways plan to be developed for the State in the near future. Thank you for taking time to fill out this questionnaire.

1. Have you ever traveled in the Lake Sunapee Region? ☐ no ☐ yes ☐ don't know
2. Prior to visiting New Hampshire, had you heard about the Lake Sunapee Region?
☐ no ☐ yes
3. How did you first hear about the Lake Sunapee Region? ☐ Highway Signs,
☐ Tourist Information Center, ☐ Friends/Family, ☐ Brochure, ☐ Newspaper or
Magazine, ☐ Radio or TV, ☐ Other _____
☐ I have not heard about the Lake Sunapee Region?
4. In planning vacations, to what extent do you look for scenic byways?
☐ Never ☐ Sometimes ☐ Always
5. When in New Hampshire, to what extent do you travel on scenic back roads
as opposed to major highways? ☐ Almost never, ☐ Sometimes, ☐ Always
6. In the designation of a scenic byway which of the following would you consider
important. **(CHECK ALL THAT APPLY)**
☐ Mountains, ☐ Backroads, ☐ Old Mills, ☐ Rivers, ☐ Stonewalls,
☐ Inns and Taverns, ☐ Lakes, ☐ Covered Bridges, ☐ Farms, ☐ Scenic
Vistas, ☐ Historic Sites, ☐ Camping Areas, ☐ State Parks, ☐ Other _____
_____.
7. When visiting New Hampshire do you usually: ☐ go to a single destination,
or ☐ tour different parts of the state.
8. Do you have a primary destination on this trip? ☐ no, ☐ yes: what is it:

9. On this particular visit are you: ☐ vacationing in the area, ☐ on a day
trip?
10. On this trip, which of the following activities are you planning to do in
New Hampshire? **(CHECK ALL THAT APPLY)**
☐ Personal or official business, ☐ Attending a cultural or sporting event
☐ Shopping, ☐ Outdoor Recreation (Hiking, Camping, etc.), ☐ Visiting
Family and Friends, ☐ Sports (Golfing, Tennis, etc.), ☐ Visiting Scenic areas,
☐ Driving for Pleasure, ☐ Visiting Museums/Historical Sites, ☐ Entertainment,
(Music or Theater), ☐ Other _____
11. About how many nights do you plan to spend in the area? (CHECK ONE) ☐ None,
☐ 1 night, ☐ 2 to 3, ☐ 4 to 7, ☐ More than a week
12. If you are staying overnight on this trip to New Hampshire, where are you
staying? **(CHECK ALL THAT APPLY)**
☐ I am not staying overnight, ☐ Inn, ☐ Condominium, ☐ with friends,
☐ Hotel/Motel, ☐ Campground, ☐ Other: _____
13. How many are in your travel party? ☐ Number of adults, ☐ Number of
children (Under 18)
14. For each of the following items, about how much money will you spend per day
(on average) on this trip? \$ _____ Lodging, \$ _____ Entrance Fees,
\$ _____ Food, \$ _____ Souvenirs, \$ _____ Transportation,
\$ _____ Entertainment

Thank you for your help!

Enjoy New Hampshire!

NEW HAMPSHIRE SCENIC BYWAYS SURVEY

The New Hampshire Department of Transportation and the Office of State Planning are conducting this survey to learn more about those features that affect your trips to New Hampshire. It will be an important component of a scenic byways plan to be developed for the State in the near future. Thank you for taking time to fill out this questionnaire.

1. Have you ever traveled along the Kancamagus Highway? ☐ no ☐ yes ☐ don't know
2. Prior to visiting New Hampshire, had you heard about the Kancamagus Highway?
☐ no ☐ yes
3. How did you first hear about the Kancamagus Highway? ☐ Highway Signs,
☐ Tourist Information Center, ☐ Friends/Family, ☐ Brochure, ☐ Newspaper or
Magazine, ☐ Radio or TV, ☐ Other _____
☐ I have not heard about the Kancamagus Highway?
4. In planning vacations, to what extent do you look for scenic byways?
☐ Never ☐ Sometimes ☐ Always
5. When in New Hampshire, to what extent do you travel on scenic back roads
as opposed to major highways? ☐ Almost never, ☐ Sometimes, ☐ Always
6. In the designation of a scenic byway which of the following would you consider
important. **(CHECK ALL THAT APPLY)**
☐ Mountains, ☐ Backroads, ☐ Old Mills, ☐ Rivers, ☐ Stonewalls,
☐ Inns and Taverns, ☐ Lakes, ☐ Covered Bridges, ☐ Farms, ☐ Scenic
Vistas, ☐ Historic Sites, ☐ Camping Areas, ☐ State Parks, ☐ Other _____.
7. When visiting New Hampshire do you usually: ☐ go to a single destination,
or ☐ tour different parts of the state.
8. Do you have a primary destination on this trip? ☐ no, ☐ yes: what is it:

9. On this particular visit are you: ☐ vacationing in the area, ☐ on a day
trip?
10. On this trip, which of the following activities are you planning to do in
New Hampshire? **(CHECK ALL THAT APPLY)**
☐ Personal or official business, ☐ Attending a cultural or sporting event
☐ Shopping, ☐ Outdoor Recreation (Hiking, Camping, etc.), ☐ Visiting
Family and Friends, ☐ Sports (Golfing, Tennis, etc.), ☐ Visiting Scenic areas,
☐ Driving for Pleasure, ☐ Visiting Museums/Historical Sites, ☐ Entertainment,
(Music or Theater), ☐ Other _____
11. About how many nights do you plan to spend in the area? (CHECK ONE) ☐ None,
☐ 1 night, ☐ 2 to 3, ☐ 4 to 7, ☐ More than a week
12. If you are staying overnight on this trip to New Hampshire, where are you
staying? **(CHECK ALL THAT APPLY)**
☐ I am not staying overnight, ☐ Inn, ☐ Condominium, ☐ with friends,
☐ Hotel/Motel, ☐ Campground, ☐ Other: _____
13. How many are in your travel party? ☐ Number of adults, ☐ Number of
children (Under 18)
14. For each of the following items, about how much money will you spend per day
(on average) on this trip? \$ _____ Lodging, \$ _____ Entrance Fees,
\$ _____ Food, \$ _____ Souvenirs, \$ _____ Transportation,
\$ _____ Entertainment

Thank you for your help!

Enjoy New Hampshire!

PART VI

VISITOR SURVEY STATISTICS

New Hampshire's Scenic Byways:
Visitor Survey
Preliminary Report

Submitted to:
New Hampshire
Office of State Planning

Submitted by:
Jerry J. Vaske, Ph.D.

43 Merrimac St.
Amesbury, Massachusetts 01319

July 16, 1990

Executive Summary

To learn more about the influence of New Hampshire's scenic byways on tourists' attitudes and behaviors, a visitor survey was distributed to travellers along the Kancamagus Highway and in the Lake Sunapee Region.

This preliminary report summarizes the findings to date. A total of 200 completed surveys from the Kancamagus have been entered into the database as of July 13.

Numerical as well as graphical displays of the data are presented. Following is a list of the major findings:

Major Findings:

- * Scenic byways play an important role in attracting visitors. Nearly three-fifths (58%) indicated that they "always" look for scenic byways when planning vacations. An additional 40 percent said they "sometimes" include scenic roads in their trip plans.
- * When in New Hampshire, about a third of the respondents reported that they "always" travel on scenic back roads.
- * Three-quarters of the individuals in this sample had travelled along the Kancamagus Highway previously.
- * A majority of the visitors had heard about the Kancamagus prior to visiting New Hampshire. Family and friends (55%) were the primary source of information about the highway. Tourist information centers ranked second. None of the other items listed on the survey (e.g., highway signs, brochures, newspapers, etc.) accounted for more than 7 percent of the responses.
- * Mountains, rivers and scenic vistas were considered the most important criteria in the designation of scenic byways. Over two thirds of the respondents considered these three features important. Other criteria identified by a majority of the travellers were lakes, covered bridges, historic sites and State Parks. Farms and Inns/taverns were rated least important.
- * Sixty-three percent of the respondents said they usually tour different areas of New Hampshire, as opposed to returning to the single destination. This suggests that this group of individuals would find the designation of additional scenic roads attractive.
- * Consistent with other survey findings (e.g., Davidson-Peterson, 1988), outdoor recreation activities, visiting scenic areas, and driving for pleasure were identified as the primary reasons for visiting New Hampshire.
- * On average, this sample planned to spend 3.1 nights in the area. Thirteen percent were staying more than a week.
- * Of those who were staying overnight, 42 percent were staying in a campground; a finding which further supports the significance of outdoor activities. An additional 27 percent were staying in a hotel or motel.
- * The typical travel party consisted of two adults (82%) and no children (65%).
- * Food and lodging represented the largest daily expenditures (Mean = \$34.58 and \$34.16, respectively). On average, this sample of individuals planned to spend \$110.86 per day on this trip.

8. Do you have a *primary* destination on this trip?

41% no
59 yes

9. On this particular visit are you:

68% vacationing in the area
32 on a day trip

10. On this trip, which of the following activities are you planning to do in New Hampshire?
(CHECK ALL THAT APPLY)

69% Outdoor recreation (Hiking, Camping, etc.)
66 Visiting scenic areas
44 Driving for pleasure
36 Shopping
19 Visiting museums/historical sites
13 Visiting family and friends
10 Entertainment (Music or Theater)
8 Sports (Golfing, Tennis, etc.)
6 Personal or official business
6 Other
3 Attending a cultural or sporting event

11. About how many nights do you plan to spend in the area? (CHECK ONE)

21% None
8 1 night
36 2 to 3
22 4 to 7
13 More than a week

Average = 3.1 nights

12. If you are staying overnight on this trip to New Hampshire, where are you staying?
(CHECK ALL THAT APPLY)

13% I am not staying overnight

42% Campground
27 Hotel/Motel
11 Inn
7 Condominium
7 with friends

13. How many are in your travel party?

Average

2.36 Number of adults
0.70 Number of children (Under 18)
3.06 Total Party Size

14. For each of the following items, about how much money will you spend *per day* (on average) on this trip?

Average (\$)		Range (\$)
\$34.58	Food	0 to 500
34.16	Lodging	0 to 400
15.20	Entrance Fees	0 to 400
12.90	Transportation	0 to 300
7.42	Souvenirs	0 to 150
6.16	Entertainment	0 to 100
\$110.86	Total	0 to 800

New Hampshire Scenic Byways Survey
Preliminary Findings - Kancamagus Highway (n = 200)

1. Have you ever travelled along the Kancamagus Highway?

22% no
75 yes
3 don't know

2. Prior to visiting New Hampshire, had you heard about the Kancamagus Highway?

46% no
54 yes

3. How did you first hear about the Kancamagus Highway?

55% Friends / Family
12 Tourist Information Center
7 Highway Signs
6 Brochure
1 Newspaper or Magazine
1 Radio or TV
16 Other
3 I have not heard about the Kancamagus

4. *In planning vacations*, to what extent to do you look for scenic byways?

3% Never
40 Sometimes
58 Always

5. When in New Hampshire, to what extent do you travel on scenic back roads as opposed to major highways?

3% Almost never
66 Sometimes
31 Always

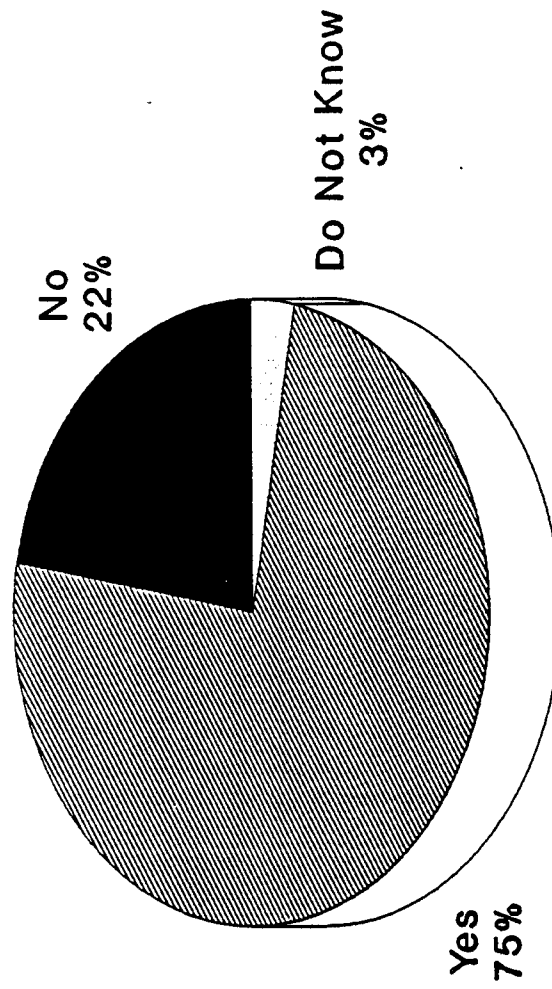
6. In the designation of a scenic byway, which of the following would you consider important? (Check all that apply)

95% Mountains
79 Rivers
67 Scenic Vistas
64 Lakes
60 Covered Bridges
52 Historic Sites
50 State Parks
41 Camping Areas
40 Backroads
37 Old Mills
28 Stonewalls
21 Farms
19 Inns & Taverns
7 Other

7. When visiting New Hampshire do you *usually*:

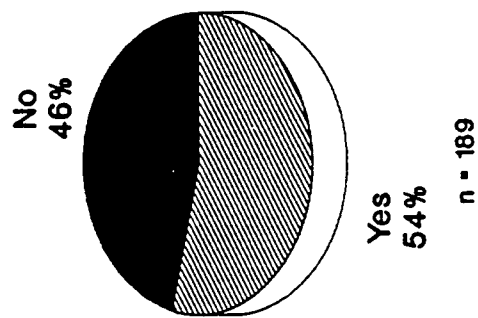
37% go to a single destination, or
63 tour different parts of the state

Have you ever travelled on the Kancamagus Highway?

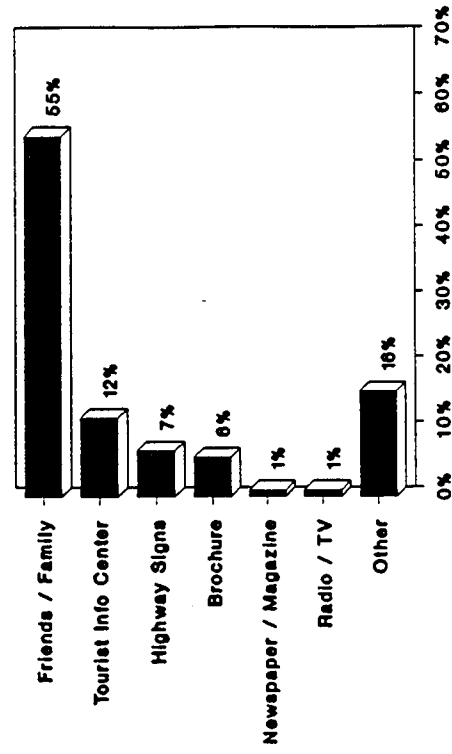


n = 197

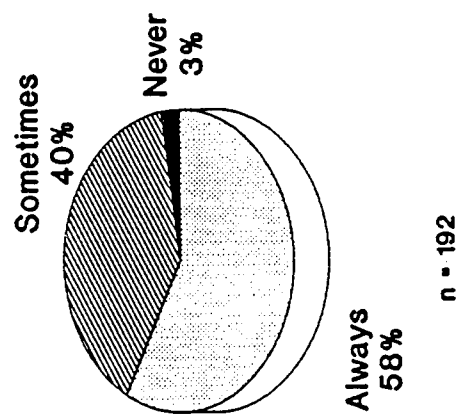
Prior to visiting New Hampshire
had you heard about the Kancamagus?



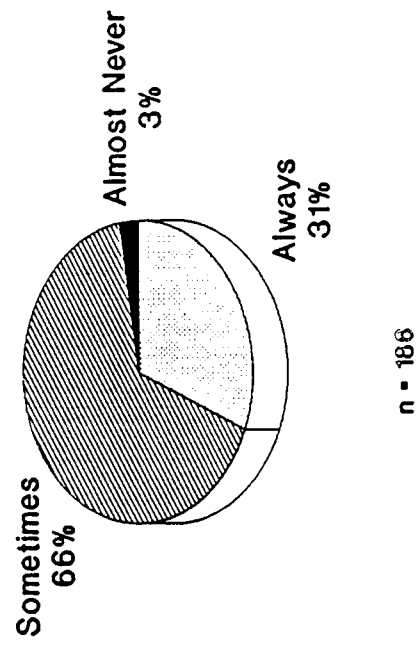
How did you first hear about
the Kancamagus Highway?



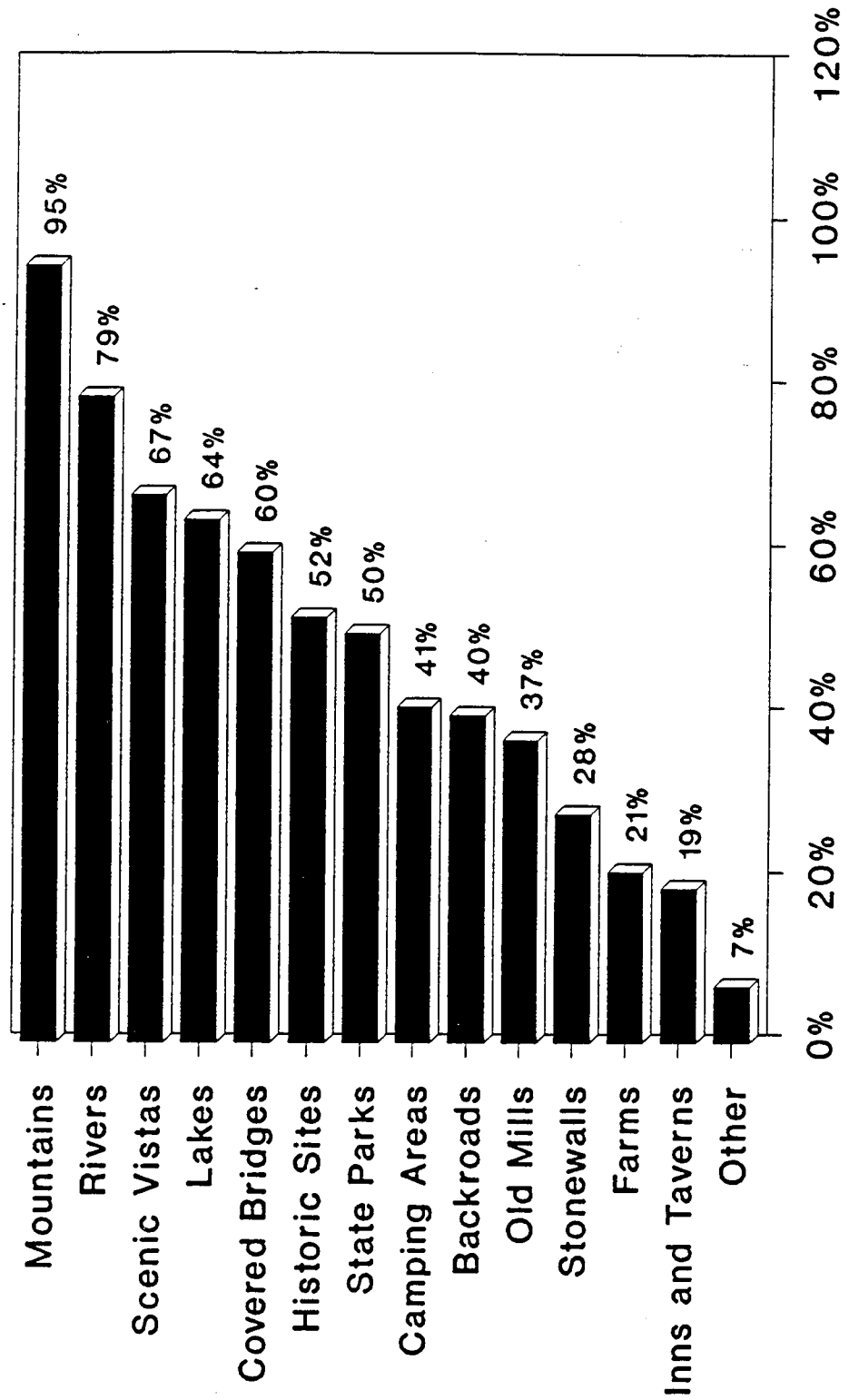
In planning vacations, to what extent
do you look for scenic byways?



When in New Hampshire, to what extent
do you travel on scenic byways?

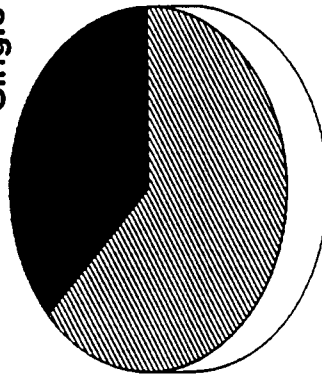


In the designation of a scenic byway
which of the following are important?



When visiting New Hampshire,
do you usually go to:

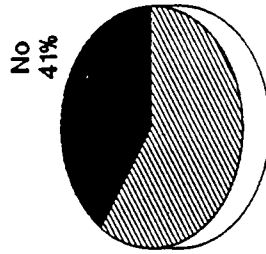
Single Destination
37%



Different Parts
63%

n = 135

Do you have a primary destination
on this trip?

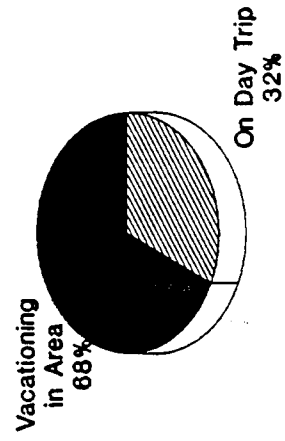


Yes
59%

No
41%

n = 143

On this particular visit
are you:

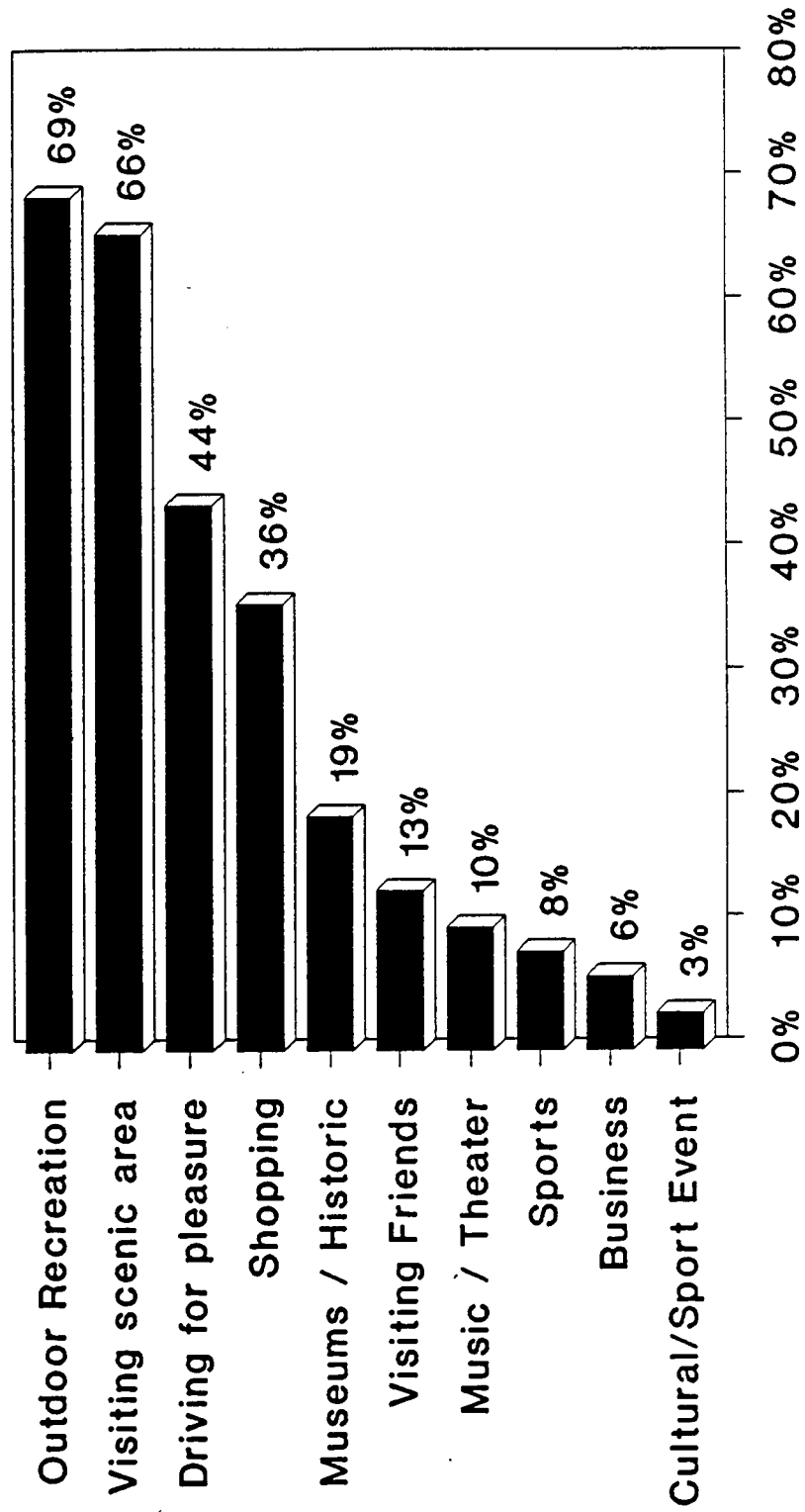


Vacationing
in Area
68%

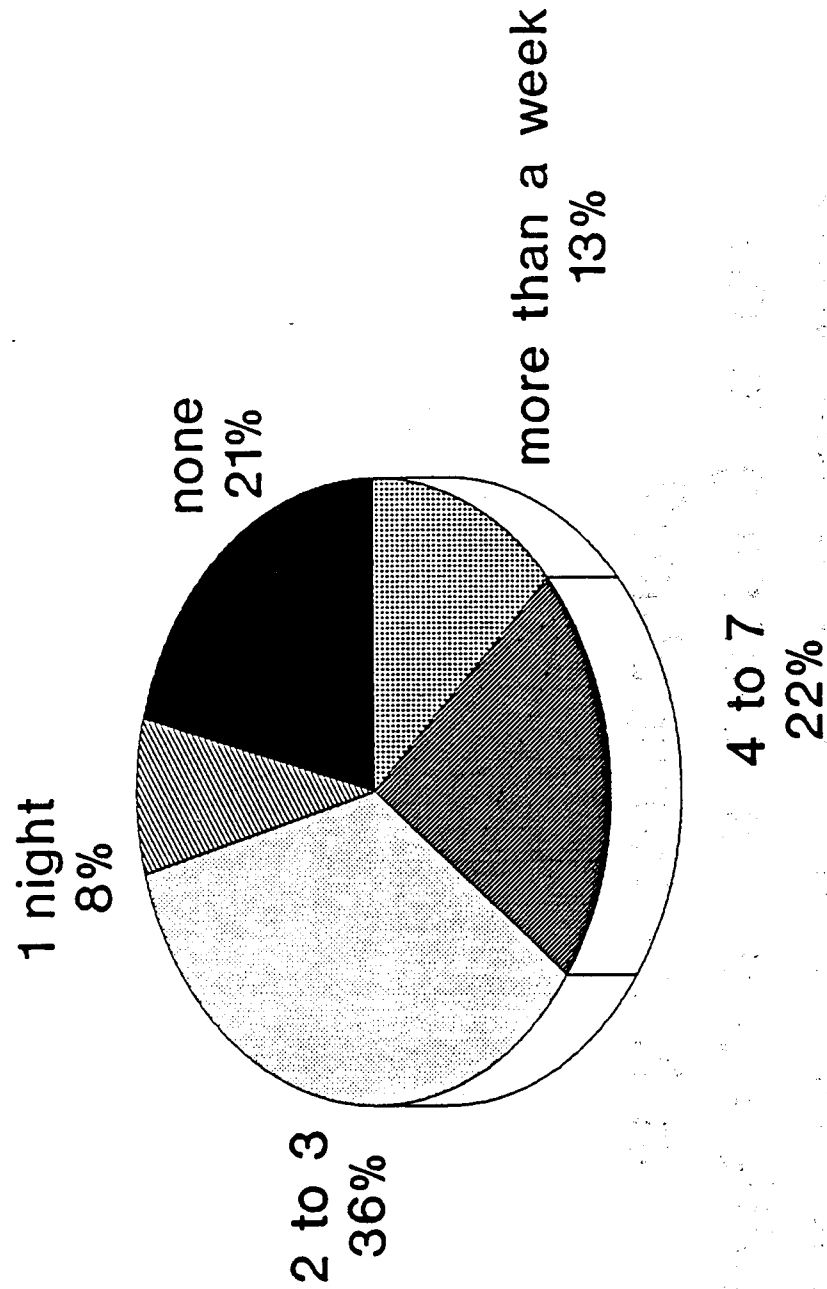
On Day Trip
32%

n = 138

On this trip, which of the following activities are you planning to do in New Hampshire?

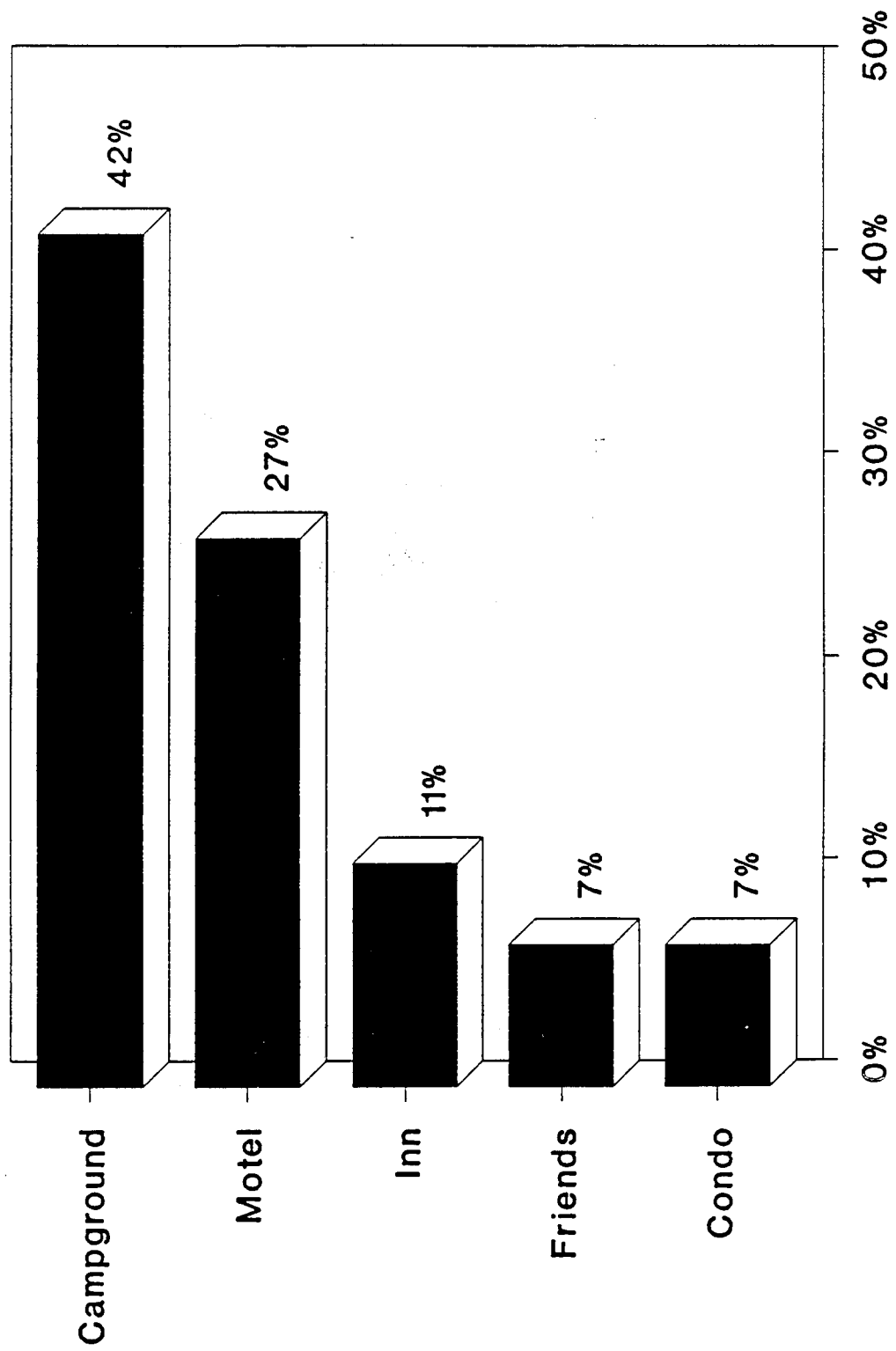


About how many nights do you
plan to spend in the area?

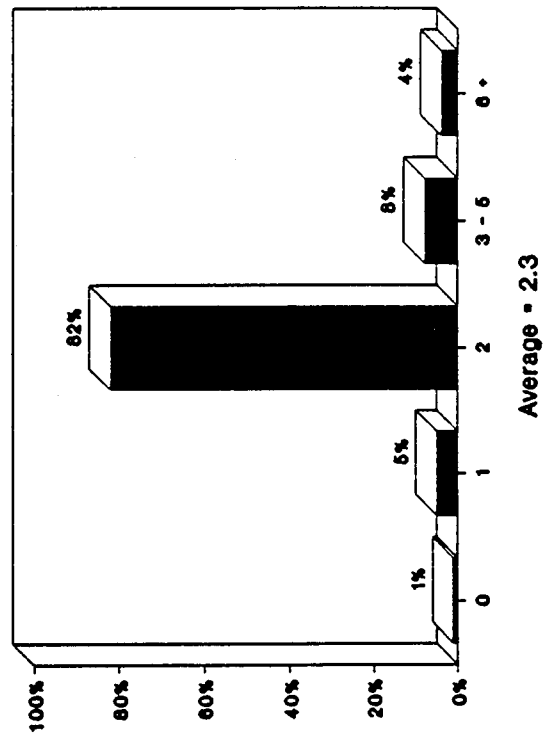


Average = 3.1 nights

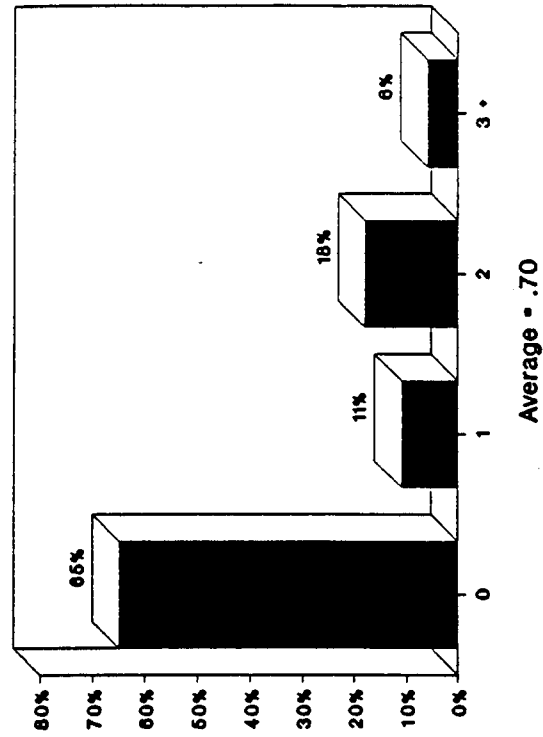
Where are you staying?



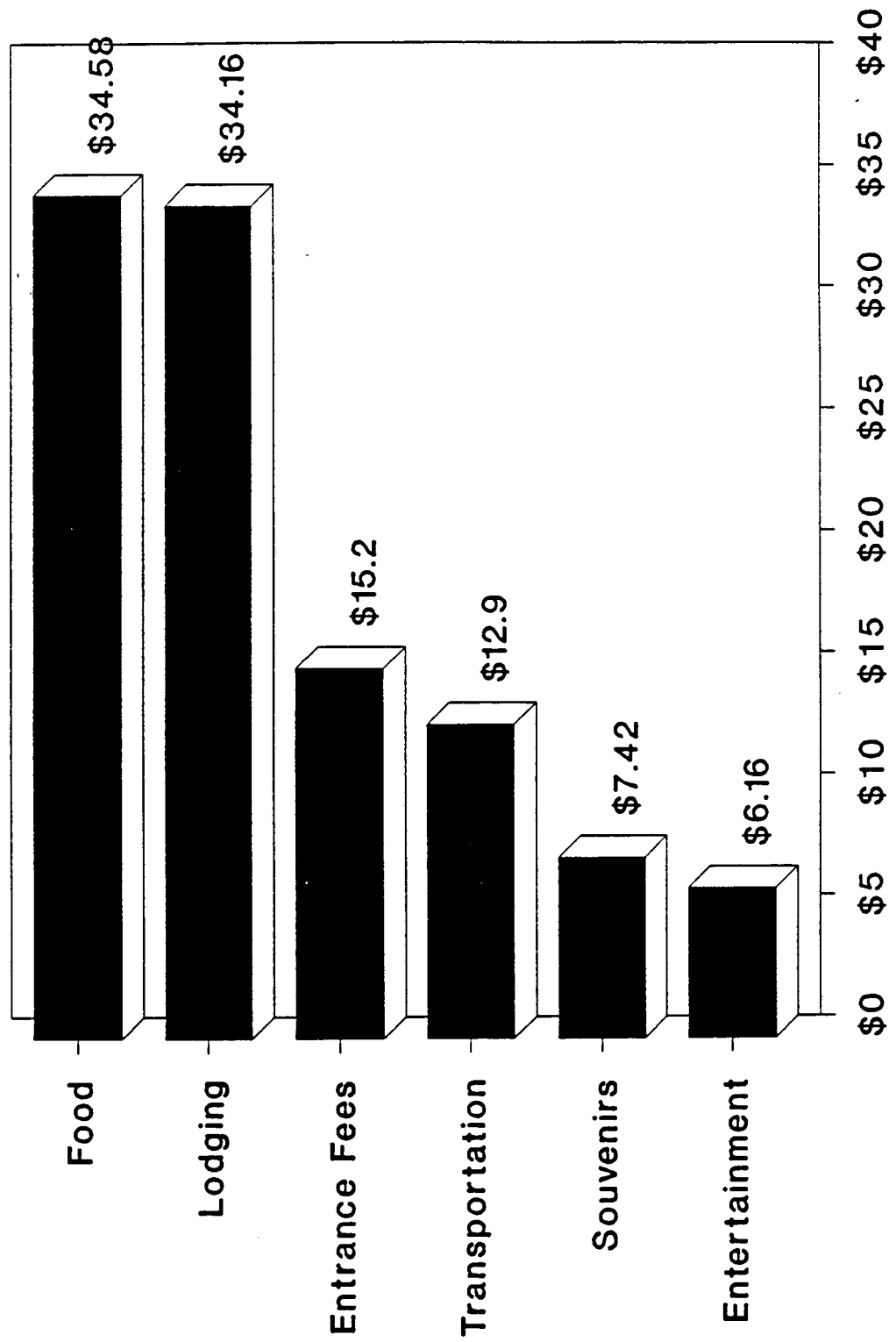
Number of Adults in Party



Number of children in party



Average Daily Expenditures



New Hampshire's Scenic Byways:

Visitor Survey

Interim Report 2

Overall Frequencies

n = 744

Submitted to:
New Hampshire
Office of State Planning

Submitted by:
Jerry J. Vaske, Ph.D.

43 Merrimac St.
Amesbury, Massachusetts 01319

August 9, 1990

LOCATION Location where survey was completed

Label	Frequency	Percent	Cum Percent
Kanc	502	67.5	67.5
Sunapee	242	32.5	100.0
	-----	-----	
	744	100.0	

Valid Cases 744

Missing Cases 0

EVERTRAV Ever Travelled on Kang or Sunapee

Label	Frequency	Percent	Cum Percent
No	171	24.5	24.5
Yes	483	69.1	93.6
Do Not Know	45	6.4	100.0
No Response	45	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 699

Missing Cases 45

HEARD Prior to visit heard about area

Label	Frequency	Percent	Cum Percent
No	249	37.2	37.2
Yes	421	62.8	100.0
No Response	74	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 670

Missing Cases 74

FRSTHEAR How first heard about area

Label	Frequency	Percent	Cum Percent
Highway Signs	30	4.6	4.6
Tourist Information	49	7.5	12.1
Friends Family	392	59.8	71.9
Brochure	45	6.9	78.8
Newspaper Magazine	14	2.1	80.9
Radio or TV	6	.9	81.8
Other	88	13.4	95.3
Have not heard about	31	4.7	100.0
No Response	89	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 655
Missing Cases 89

PLANUSE In planning - look for byways

Label	Frequency	Percent	Cum Percent
Never	22	3.2	3.2
Sometimes	272	39.8	43.0
Always	389	57.0	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

TRAVBACK In NH - Travel back roads

Label	Frequency	Percent	Cum Percent
Almost Never	25	3.7	3.7
Sometimes	458	68.5	72.2
Always	186	27.8	100.0
No Response	75	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 669
Missing Cases 75

MOUNTAIN considered important

Label	Frequency	Percent	Cum Percent
No	55	8.1	8.1
Yes	628	91.9	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

BACKROAD Considered Important

Label	Frequency	Percent	Cum Percent
No	353	51.7	51.7
Yes	330	48.3	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

OLDMILLS Considered Important

Label	Frequency	Percent	Cum Percent
No	398	58.3	58.3
Yes	285	41.7	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

RIVERS Considered Important

Label	Frequency	Percent	Cum Percent
No	172	25.2	25.2
Yes	511	74.8	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

STONEWAL Considered Important

Label	Frequency	Percent	Cum Percent
No	459	67.2	67.2
Yes	224	32.8	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

TAVERNS Considered Important

Label	Frequency	Percent	Cum Percent
No	503	73.6	73.6
Yes	180	26.4	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

LAKES Considered Important

Label	Frequency	Percent	Cum Percent
No	223	32.7	32.7
Yes	460	67.3	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

COVBRIDG Considered Important

Label	Frequency	Percent	Cum Percent
No	267	39.1	39.1
Yes	416	60.9	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

FARMS Considered Important

Label	Frequency	Percent	Cum Percent
No	470	68.8	68.8
Yes	213	31.2	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

VISTAS Considered Important

Label	Frequency	Percent	Cum Percent
No	235	34.4	34.4
Yes	448	65.6	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

HISTORIC Considered Important

Label	Frequency	Percent	Cum Percent
No	310	45.4	45.4
Yes	373	54.6	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 683
Missing Cases 61

CAMPING Considered Important

Label	Frequency	Percent	Cum Percent
No	427	62.5	62.5
Yes	256	37.5	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	
Valid Cases	683		
Missing Cases	61		

STATEPRK Considered Important

Label	Frequency	Percent	Cum Percent
No	358	52.4	52.4
Yes	325	47.6	100.0
No Response	61	MISSING	
	-----	-----	
	744	100.0	
Valid Cases	683		
Missing Cases	61		

USULVIST When visiting NH do you usually

Label	Frequency	Percent	Cum Percent
Single Destination	236	43.6	43.6
Tour Different Parts	305	56.4	100.0
No Response	203	MISSING	
	-----	-----	
	744	100.0	
Valid Cases	541		
Missing Cases	203		

PRIMDEST Primary destination

Label	Frequency	Percent	Cum Percent
No	210	37.4	37.4
Yes	351	62.6	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561
Missing Cases 183

VACADAY Vacationing or day trip

Label	Frequency	Percent	Cum Percent
Vacationing in Area	335	62.0	62.0
On Day Trip	205	38.0	100.0
No Response	204	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 540
Missing Cases 204

BUSINESS personal or official business

Label	Frequency	Percent	Cum Percent
No	495	88.2	88.2
Yes	66	11.8	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561
Missing Cases 183

CULTURAL Attend cultural event

Label	Frequency	Percent	Cum Percent
No	518	92.3	92.3
Yes	43	7.7	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561
Missing Cases 183

SHOPPING

Label	Frequency	Percent	Cum Percent
No	369	65.8	65.8
Yes	192	34.2	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561
Missing Cases 183

OUTRECR Outdoor Recreation

Label	Frequency	Percent	Cum Percent
No	201	35.8	35.8
Yes	360	64.2	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561
Missing Cases 183

VISTFAML Visiting family and friends

Label	Frequency	Percent	Cum Percent
No	425	75.8	75.8
Yes	136	24.2	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561

Missing Cases 183

SPORTS Golf Tennis etc

Label	Frequency	Percent	Cum Percent
No	507	90.4	90.4
Yes	54	9.6	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561

Missing Cases 183

VISTSCEN Visiting scenic areas

Label	Frequency	Percent	Cum Percent
No	231	41.2	41.2
Yes	330	58.8	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561

Missing Cases 183

DRIVING Driving for pleasure

Label	Frequency	Percent	Cum Percent
No	338	60.2	60.2
Yes	223	39.8	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561

Missing Cases 183

VISTMUSE Visiting museums historic sites

Label	Frequency	Percent	Cum Percent
No	433	77.2	77.2
Yes	128	22.8	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561

Missing Cases 183

MUSIC Entertainment music or theater

Label	Frequency	Percent	Cum Percent
No	483	86.1	86.1
Yes	78	13.9	100.0
No Response	183	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 561

Missing Cases 183

NIGHTS Number of Nights in Area

Label	Frequency	Percent	Cum Percent
none	109	20.0	20.0
1 night	55	10.1	30.0
2 to 3	183	33.5	63.6
4 to 7	129	23.6	87.2
more than a week	70	12.8	100.0
No Response	198	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 546

Missing Cases 198

NOTSTAY Not staying in the area

Label	Frequency	Percent	Cum Percent
No	427	80.7	80.7
Yes	102	19.3	100.0
No Response	215	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 529

Missing Cases 215

INN Staying at Inn

Label	Frequency	Percent	Cum Percent
No	374	87.6	87.6
Yes	53	12.4	100.0
No Response	317	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 427

Missing Cases 317

CONDO Staying in Condo

Label	Frequency	Percent	Cum Percent
No	399	93.4	93.4
Yes	28	6.6	100.0
	317	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 427

Missing Cases 317

WITHFRND Staying with Friends

Label	Frequency	Percent	Cum Percent
No	359	84.1	84.1
Yes	68	15.9	100.0
	317	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 427

Missing Cases 317

HOTEL Staying in Hotel Motel

Label	Frequency	Percent	Cum Percent
No	312	73.1	73.1
Yes	115	26.9	100.0
	317	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 427

Missing Cases 317

CAMPGRND Staying at Campground

Label	Frequency	Percent	Cum Percent
No	306	71.7	71.7
Yes	121	28.3	100.0
	317	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 427

Missing Cases 317

ADULTS Number of Adults

Label	Frequency	Percent	Cum Percent
no adults	4	.7	.7
1 adult	32	5.9	6.6
2 adults	393	72.2	78.9
3 to 5 adults	86	15.8	94.7
more than 6	29	5.3	100.0
No response	200	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 544

Missing Cases 200

CHILDREN Number of Children under 18

Label	Frequency	Percent	Cum Percent
no children	310	57.0	57.0
1 child	66	12.1	69.1
2 children	107	19.7	88.8
3 to 5 children	53	9.7	98.5
more than 6	8	1.5	100.0
No response	200	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 544

Missing Cases 200

LODGING Money spent on lodging

Label	Frequency	Percent	Cum Percent
0 dollars	166	40.4	40.4
\$1 to \$25	83	20.2	60.6
\$26 to \$50	49	11.9	72.5
\$51 to \$75	61	14.8	87.3
\$76 to \$100	25	6.1	93.4
more than \$100	27	6.6	100.0
No Response	333	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 411

Missing Cases 333

FEES Money Spent on Fees

Label	Frequency	Percent	Cum Percent
0 dollars	218	53.2	53.2
\$1 to \$25	141	34.4	87.6
\$26 to \$50	34	8.3	95.9
\$more than \$50	17	4.1	100.0
No Response	334	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 410
Missing Cases 334

FOOD Money Spent on Food

Label	Frequency	Percent	Cum Percent
0 dollars	49	11.9	11.9
\$1 to \$25	154	37.5	49.4
\$26 to \$50	129	31.4	80.8
\$51 to \$75	36	8.8	89.5
\$76 to \$100	27	6.6	96.1
more than \$100	16	3.9	100.0
No Response	333	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 411
Missing Cases 333

SOUVENIR Money Spent on Souvenirs

Label	Frequency	Percent	Cum Percent
0 dollars	243	59.1	59.1
\$1 to \$25	127	30.9	90.0
\$26 to \$50	28	6.8	96.8
more than \$75	13	3.2	100.0
No Response	333	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 411

Missing Cases 333

TRANSPORT Money Spent on Transportation

Label	Frequency	Percent	Cum Percent
0 dollars	173	42.1	42.1
\$1 to \$25	190	46.2	88.3
\$26 to \$50	40	9.7	98.1
more than \$50	8	1.9	100.0
No Response	333	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 411

Missing Cases 333

ENTRTAIN Money Spent on Entertainment

Label	Frequency	Percent	Cum Percent
0 dollars	285	69.3	69.3
\$1 to \$25	80	19.5	88.8
\$26 to \$50	31	7.5	96.4
more than \$50	15	3.6	100.0
No Response	333	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 411
Missing Cases 333

TOTAL

Label	Frequency	Percent	Cum Percent
\$1 to \$25	53	12.9	12.9
\$26 to \$50	74	18.0	31.0
\$51 to \$75	55	13.4	44.4
\$76 to \$100	51	12.4	56.8
\$100 to 150	68	16.6	73.4
\$151 to 200	46	11.2	84.6
\$201 to 300	32	7.8	92.4
more than \$300	31	7.6	100.0
No Response	334	MISSING	
	-----	-----	
	744	100.0	

Valid Cases 410
Missing Cases 334

New Hampshire's Scenic Byways:

Visitor Survey

Interim Report 3

Crosstabulations

n = 744

Submitted to:

New Hampshire
Office of State Planning

Submitted by:

Jerry J. Vaske, Ph.D.

43 Merrimac St.
Amesbury, Massachusetts 01319

August 9, 1990

This report presents a series of crosstabulations. In all cases the independent variable is the location of the interview (i.e. Kancamagus Highway or Lake Sunapee region).

Brief variable descriptions and labels have been added to make the printout more readable.

Cell entries are the percentage of individuals at each location who gave a particular response. For example, on page 3, 71.4 percent of the Kancamagus respondents had travelled along the highway previously. By comparison, only 64.5 percent of the Lake Sunapee respondents had been in the Sunapee region previously.

The Chi-square statistic indicates whether the response distributions for the two areas differ statistically. Using the data from page 3 as an example, the statistic shows that for the this variable, the two areas do differ (Chi-square = 8.42; $p < .01$). In general, if the significance level is less than or equal to .05, the two areas can be said to differ statistically.

Crosstabulation: EVERTRAV Ever Travelled on Kang or Sunapee
 By LOCATION Location where survey was completed

EVERTRAV	Kanc	Sunapee	
No	21.3	30.8	171 24.5
Yes	71.4	64.5	483 69.1
Do Not Know	7.3	4.7	45 6.4
Column Total	465 66.5	234 33.5	699 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
8.42828	2	.0148	15.064	None

Number of Missing Observations = 45

Crosstabulation: HEARD Prior to visit heard about area
 By LOCATION Location where survey was completed

HEARD	Kanc	Sunapee	
No	41.2	29.2	249 37.2
Yes	58.8	70.8	421 62.8
Column Total	444 66.3	226 33.7	670 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
8.74748	1	.0031	83.991	None
9.25474	1	.0023	(Before Yates Correction)	

Number of Missing Observations = 74

Crosstabulation: FRSTHEAR How first heard about area
By LOCATION Location where survey was completed

FRSTHEAR	Kanc	Sunapee	
Highway Signs	6.0	1.8	30 4.6
Tourist Informat	9.3	4.0	49 7.5
Friends Family	57.3	64.7	392 59.8
Brochure	6.3	8.0	45 6.9
Newspaper Magazi	.9	4.5	14 2.1
Radio or TV	.9	.9	6 .9
Other	12.8	14.7	88 13.4
Have not heard of	6.5	1.3	31 4.7
Column Total	431 65.8	224 34.2	655 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
30.62627	7	.0001	2.052	3 OF 16 (18.8%)

Number of Missing Observations = 89

Crosstabulation: PLANUSE In planning - look for byways
 By LOCATION Location where survey was completed

PLANUSE	Kanc	Sunapee	
Never	2.0	5.6	22 3.2
Sometimes	37.6	44.2	272 39.8
Always	60.4	50.2	389 57.0
Column Total	452 66.2	231 33.8	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
10.70344	2	.0047	7.441	None

Number of Missing Observations = 61

Crosstabulation: TRAVBACK In NH - Travel back roads
 By LOCATION Location where survey was completed

TRAVBACK	Kanc	Sunapee	
Almost Never	4.1	3.1	25 3.7
Sometimes	65.5	74.1	458 68.5
Always	30.4	22.8	186 27.8
Column Total	441 65.9	228 34.1	669 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
5.13608	2	.0767	8.520	None

Number of Missing Observations = 75

Crosstabulation: MOUNTAIN considered important
 By LOCATION Location where survey was completed

	Kanc	Sunapee	
MOUNTAIN			
No	6.5	11.1	55 8.1
Yes	93.5	88.9	628 91.9
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
3.78909	1	.0516	18.924	None
4.38719	1	.0362	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: BACKROAD Considered Important
 By LOCATION Location where survey was completed

BACKROAD	Kanc	Sunapee	
No	55.6	44.3	353 51.7
Yes	44.4	55.7	330 48.3
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
7.46992	1	.0063	113.543	None
7.91694	1	.0049	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: OLDMILLS Considered Important
 By LOCATION Location where survey was completed

OLDMILLS	Kanc	Sunapee	
No	59.4	56.2	398 58.3
Yes	40.6	43.8	285 41.7
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
.52595	1	.4683	98.060	None
.65108	1	.4197	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: RIVERS Considered Important
 By LOCATION Location where survey was completed

RIVERS	Kanc	Sunapee	
No	22.5	30.2	172 25.2
Yes	77.5	69.8	511 74.8
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
4.41218	1	.0357	59.180	None
4.81056	1	.0283	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: STONEWAL Considered Important
 By LOCATION Location where survey was completed

STONEWAL	Kanc	Sunapee	
No	67.0	67.7	459 67.2
Yes	33.0	32.3	224 32.8
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
.00962	1	.9219	77.072	None
.03381	1	.8541	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: TAVERNS Considered Important
 By LOCATION Location where survey was completed

TAVERNS			
	Kanc	Sunapee	
No	78.3	64.7	503 73.6
Yes	21.7	35.3	180 26.4
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
14.13945	1	.0002	61.933	None
14.83527	1	.0001	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: LAKES Considered Important
 By LOCATION Location where survey was completed

LAKES	Kanc	Sunapee	
No	35.0	28.1	223 32.7
Yes	65.0	71.9	460 67.3
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
3.08608	1	.0790	76.728	None
3.39519	1	.0654	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: COVBRIDG Considered Important
 By LOCATION Location where survey was completed

COVBRIDG	Kanc	Sunapee	
No	36.8	43.4	267 39.1
Yes	63.2	56.6	416 60.9
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
2.52846	1	.1118	91.867	None
2.79774	1	.0944	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: FARMS Considered Important
By LOCATION Location where survey was completed

FARMS	Kanc	Sunapee	
No	72.8	61.3	470 68.8
Yes	27.2	38.7	213 31.2
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
8.95681	1	.0028	73.287	None
9.48472	1	.0021	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: VISTAS Considered Important
 By LOCATION Location where survey was completed

VISTAS	Kanc	Sunapee	
No	32.4	38.3	235 34.4
Yes	67.6	61.7	448 65.6
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
2.14757	1	.1428	80.857	None
2.40322	1	.1211	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: HISTORIC Considered Important
 By LOCATION Location where survey was completed

HISTORIC	Kanc	Sunapee	
No	46.0	44.3	310 45.4
Yes	54.0	55.7	373 54.6
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
.12231	1	.7265	106.662	None
.18544	1	.6667	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: CAMPING Considered Important
 By LOCATION Location where survey was completed

CAMPING	Kanc	Sunapee	
No	57.8	71.5	427 62.5
Yes	42.2	28.5	256 37.5
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
11.72798	1	.0006	88.082	None
12.30472	1	.0005	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: STATEPRK Considered Important
 By LOCATION Location where survey was completed

STATEPRK	Kanc	Sunapee	
No	52.9	51.5	358 52.4
Yes	47.1	48.5	325 47.6
Column Total	448 65.6	235 34.4	683 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
.07316	1	.7868	111.823	None
.12329	1	.7255	(Before Yates Correction)	

Number of Missing Observations = 61

Crosstabulation: USULVIST When visiting NH do you usually
 By LOCATION Location where survey was completed

USULVIST	Kanc	Sunapee	
Single Destination	39.6	50.8	236 43.6
Tour Different Parts of the State	60.4	49.2	305 56.4
Column Total	346 64.0	195 36.0	541 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
5.88524	1	.0153	85.065	None
6.33143	1	.0119	(Before Yates Correction)	

Number of Missing Observations = 203

Crosstabulation: PRIMDEST Primary destination
 By LOCATION Location where survey was completed

PRIMDEST	Kanc	Sunapee	
No	40.0	32.8	210 37.4
Yes	60.0	67.2	351 62.6
Column Total	360 64.2	201 35.8	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
2.52901	1	.1118	75.241	None
2.82662	1	.0927	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: VACADAY Vacationing or day trip
 By LOCATION Location where survey was completed

VACADAY	Kanc	Sunapee	
Vacation in the Area	64.2	58.1	335 62.0
On Day Trip	35.8	41.9	205 38.0
Column Total	349 64.6	191 35.4	540 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
1.68101	1	.1948	72.509	None
1.93007	1	.1648	(Before Yates Correction)	

Number of Missing Observations = 204

Crosstabulation: BUSINESS personal or official business
 By LOCATION Location where survey was completed

BUSINESS	Kanc	Sunapee	
No	90.8	83.8	495 88.2
Yes	9.2	16.2	66 11.8
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
5.36141	1	.0206	24.000	None
6.01071	1	.0142	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: CULTURAL Attend cultural event
 By LOCATION Location where survey was completed

CULTURAL	Kanc	Sunapee	
No	93.0	91.2	518 92.3
Yes	7.0	8.8	43 7.7
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
.37802	1	.5387	15.636	None
.60807	1	.4355	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: SHOPPING
By LOCATION Location where survey was completed

SHOPPING	Kanc	Sunapee	
No	61.3	73.5	369 65.8
Yes	38.7	26.5	192 34.2
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
8.02929	1	.0046	69.818	None
8.56201	1	.0034	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: OUTRECR Outdoor Recreation
 By LOCATION Location where survey was completed

OUTRECR	Kanc	Sunapee	
No	33.3	40.2	201 35.8
Yes	66.7	59.8	360 64.2
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
2.36913	1	.1238	73.091	None
2.65924	1	.1029	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: VISTFAML Visiting family and friends
 By LOCATION Location where survey was completed

VISTFAML	Kanc	Sunapee	
No	83.2	62.7	425 75.8
Yes	16.8	37.3	136 24.2
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
28.45288	1	.0000	49.455	None
29.55580	1	.0000	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: SPORTS Golf Tennis etc
 By LOCATION Location where survey was completed

SPORTS	Kanc	Sunapee	
No	93.3	85.3	507 90.4
Yes	6.7	14.7	54 9.6
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
8.61514	1	.0033	19.636	None
9.51071	1	.0020	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: VISTSCEN Visiting scenic areas
 By LOCATION Location where survey was completed

VISTSCEN	Kanc	Sunapee	
No	35.6	51.0	231 41.2
Yes	64.4	49.0	330 58.8
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
12.09298	1	.0005	84.000	None
12.72109	1	.0004	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: DRIVING Driving for pleasure
 By LOCATION Location where survey was completed

DRIVING	Kanc	Sunapee	
No	54.1	71.1	338 60.2
Yes	45.9	28.9	223 39.8
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
14.99376	1	.0001	81.091	None
15.69625	1	.0001	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: VISTMUSE Visiting museums historic sites
 By LOCATION Location where survey was completed

VISTMUSE	Kanc	Sunapee	
No	74.5	81.9	433 77.2
Yes	25.5	18.1	128 22.8
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
3.57893	1	.0585	46.545	None
3.98553	1	.0459	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: MUSIC Entertainment music or theater
 By LOCATION Location where survey was completed

MUSIC	Kanc	Sunapee	
No	87.1	84.3	483 86.1
Yes	12.9	15.7	78 13.9
Column Total	357 63.6	204 36.4	561 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
.63300	1	.4263	28.364	None
.85091	1	.3563	(Before Yates Correction)	

Number of Missing Observations = 183

Crosstabulation: NIGHTS Number of Nights in Area
 By LOCATION Location where survey was completed

NIGHTS	Kanc	Sunapee	
none	19.1	21.5	109 20.0
1 night	10.1	10.0	55 10.1
2 to 3	35.8	29.5	183 33.5
4 to 7	23.7	23.5	129 23.6
more than a week	11.3	15.5	70 12.8
Column Total	346 63.4	200 36.6	546 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
3.66363	4	.4534	20.147	None

Number of Missing Observations = 198

Crosstabulation: NOTSTAY Not staying in the area
 By LOCATION Location where survey was completed

NOTSTAY	Kanc	Sunapee	
No	82.8	77.3	427 80.7
Yes	17.2	22.7	102 19.3
Column Total	331 62.6	198 37.4	529 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
2.07299	1	.1499	38.178	None
2.41384	1	.1203	(Before Yates Correction)	

Number of Missing Observations = 215

Crosstabulation: INN Staying at Inn
 By LOCATION Location where survey was completed

INN		Kanc	Sunapee	
No		88.3	86.3	374
				87.6
Yes		11.7	13.7	53
				12.4
	Column	274	153	427
	Total	64.2	35.8	100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F.< 5
.21344	1	.6441	18.991	None
.37828	1	.5385	(Before Yates Correction)	

Number of Missing Observations = 317

Crosstabulation: CONDO Staying in Condo
 By LOCATION Location where survey was completed

CONDO	Kanc	Sunapee	
No	90.9	98.0	399 93.4
Yes	9.1	2.0	28 6.6
Column Total	274 64.2	153 35.8	427 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
7.09427	1	.0077	10.033	None
8.22178	1	.0041	(Before Yates Correction)	

Number of Missing Observations = 317

Crosstabulation: WITHFRND Staying with Friends
 By LOCATION Location where survey was completed

WITHFRND	Kanc	Sunapee	
No	91.6	70.6	359 84.1
Yes	8.4	29.4	68 15.9
Column Total	274 64.2	153 35.8	427 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
30.84089	1	.0000	24.365	None
32.39164	1	.0000	(Before Yates Correction)	

Number of Missing Observations = 317

Crosstabulation: HOTEL Staying in Hotel Motel
 By LOCATION Location where survey was completed

HOTEL	Kanc	Sunapee	
No	74.1	71.2	312
Yes	25.9	28.8	115
Column Total	274	153	427
	64.2	35.8	100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
.27236	1	.6018	41.206	None
.40403	1	.5250	(Before Yates Correction)	

Number of Missing Observations = 317

Crosstabulation: CAMPGRND Staying at Campground
 By LOCATION Location where survey was completed

CAMPGRND	Kanc	Sunapee	
No	60.2	92.2	306 71.7
Yes	39.8	7.8	121 28.3
Column Total	274 64.2	153 35.8	427 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
47.75439	1	.0000	43.356	None
49.31458	1	.0000	(Before Yates Correction)	

Number of Missing Observations = 317

Crosstabulation: ADULTS Number of Adults
By LOCATION Location where survey was completed

ADULTS	Kanc	Sunapee	
no adults	.9	.5	4 .7
1 adult	7.8	2.6	32 5.9
2 adults	74.1	68.9	393 72.2
3 to 5 adults	13.8	19.4	86 15.8
more than 6	3.4	8.7	29 5.3
Column Total	348 64.0	196 36.0	544 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
15.37586	4	.0040	1.441	2 OF 10 (20.0%)

Number of Missing Observations = 200

Crosstabulation: CHILDREN Number of Children under 18
 By LOCATION Location where survey was completed

CHILDREN	Kanc	Sunapee	
no children	58.0	55.1	310 57.0
1 child	11.8	12.8	66 12.1
2 children	19.8	19.4	107 19.7
3 to 5 children	8.6	11.7	53 9.7
more than 6	1.7	1.0	8 1.5
Column Total	348 64.0	196 36.0	544 100.0

Chi-Square	D.F.	Significance	Min E.F.	Cells with E.F. < 5
1.97115	4	.7411	2.882	1 OF 10 (10.0%)

Number of Missing Observations = 200

New Hampshire's Scenic Byways:
Visitor Survey
Interim Report 4
Assorted Analyses

Submitted to:
New Hampshire
Office of State Planning

Submitted by:
Jerry J. Vaske, Ph.D.

43 Merrimac St.
Amesbury, Massachusetts 01319

August 9, 1990

t-test for: LODGING Money spent on lodging

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	272	39.4816	78.198	4.741
Sunapee	139	48.2446	92.357	7.834

t Value	Degrees of Freedom	2-Tail Prob.
-.96	241.15	.340

t-test for: FEES Money Spent on Fees

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	271	13.9410	36.830	2.237
Sunapee	139	11.0288	20.505	1.739

t Value	Degrees of Freedom	2-Tail Prob.
1.03	405.32	.305

t-test for: FOOD Money Spent on Food

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	272	38.2721	52.766	3.199
Sunapee	139	45.1439	63.159	5.357

t Value	Degrees of Freedom	2-Tail Prob.
-1.10	238.55	.272

t-test for: SOUVENIR Money Spent on Souvenirs

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	272	10.5294	21.690	1.315
Sunapee	139	9.6115	25.470	2.160

t Value	Degrees of Freedom	2-Tail Prob.
.36	242.29	.717

t-test for: TRANSPORT Money Spent on Transportation

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	272	13.1324	24.323	1.475
Sunapee	139	10.2014	15.406	1.307

t Value	Degrees of Freedom	2-Tail Prob.
1.49	390.68	.138

t-test for: ENTRTAIN Money Spent on Entertainment

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	272	8.9926	23.380	1.418
Sunapee	139	13.4820	38.201	3.240

t Value	Degrees of Freedom	2-Tail Prob.
-1.27	192.30	.206

t-test for: TOTAL

Location	Number of Cases	Mean	Standard Deviation	Standard Error
Kancamagus	271	124.5756	137.717	8.366
Sunapee	139	137.7122	161.201	13.673

t Value	Degrees of Freedom	2-Tail Prob.
-.82	243.24	.413

t-test for: NIGHTS Number of Nights in Area

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	154	3.1331	1.821	.147
Campground	120	3.9542	1.993	.182

t Value	Degrees of Freedom	2-Tail Prob.
-3.55	272	.000

t-test for: LODGING Money spent on lodging

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	80.5323	84.111	7.553
Campground	102	21.2941	43.162	4.274

t Value	Degrees of Freedom	2-Tail Prob.
6.83	190.57	.000

t-test for: FEES Money Spent on Fees

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	13.7581	40.438	3.631
Campground	101	14.7327	37.468	3.728

t Value	Degrees of Freedom	2-Tail Prob.
-.19	223	.853

t-test for: FOOD Money Spent on Food

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	50.7823	62.846	5.644
Campground	102	35.0294	47.937	4.746

t Value	Degrees of Freedom	2-Tail Prob.
2.14	222.79	.034

t-test for: SOUVENIR Money Spent on Souvenirs

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	7.8065	14.519	1.304
Campground	102	12.3922	25.983	2.573

t Value	Degrees of Freedom	2-Tail Prob.
-1.59	151.35	.114

t-test for: TRANSPORT Money Spent on Transportation

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	10.0484	15.484	1.391
Campground	102	16.4706	32.736	3.241

t Value	Degrees of Freedom	2-Tail Prob.
-1.82	137.76	.071

t-test for: ENTRTAIN Money Spent on Entertainment

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	9.6452	21.798	1.957
Campground	102	8.4902	22.766	2.254

t Value	Degrees of Freedom	2-Tail Prob.
.39	224	.698

t-test for: TOTAL

Respondent stayed at:	Number of Cases	Mean	Standard Deviation	Standard Error
Inn/Hotel/Motel	124	172.5726	132.192	11.871
Campground	101	108.8515	121.722	12.112

t Value	Degrees of Freedom	2-Tail Prob.
3.73	223	.000

How did you first hear about area	Heard about area prior to visiting	
	No	Yes
Highway Signs	10.3	2.0
Tourist Info Center	15.7	4.1
Family Friends	43.1	72.9
Brochure	9.8	5.3
Newspaper Magazine	2.9	2.0
Radio or TV		1.5
Other	18.1	12.2
	Percent Number	100 204
		100 395

Chi-Square	D.F.	Significance
71.66041	6	.0000

	Number of children in the group	
	None	Some
Vacationing in Area	60.1	64.3
On a day trip	39.9	35.7
	Percent Number	100 291
		100 249

Chi-Square	D.F.	Significance
.79991	1	.3711

Prior to visiting had you heard about the area	Driving for Pleasure	
	No	Yes
No	33.1	39.6
Yes	66.9	60.4
Percent Number	100 317	100 212
Chi-Square	D.F.	Significance
2.06267	1	.1509

Vacationing in the area	Driving for Pleasure	
	No	Yes
On a day trip	62.5	62.1
	37.5	37.9
Percent Number	100 315	100 214
Chi-Square	D.F.	Significance
.00827	1	.9276

Number of children under 18	Driving for Pleasure	
	No	Yes
None	52.1	57.4
Some	47.9	42.6
Percent Number	100 338	100 223
Chi-Square	D.F.	Significance
1.32933	1	.2489

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